

Historic, archived document

Do not assume content reflects current scientific knowledge, policies, or practices.

SLG



United States
Department of
Agriculture

Foreign
Agricultural
Service

USSR Grain Situation and Outlook

Circular Series

SG 7-90

October 1990

The USDA estimate of the 1990 Soviet Union grain crop was increased this month by 5 million tons to 235 million, based primarily on harvest reports. As of October 1, reported grain production of 211.5 million tons (excluding corn) had already exceeded 1989 total grain production of 210.9 million, which included 15.3 million of corn. Approximately 8 percent of the sown area (excluding corn) and much of the corn-for-grain area remained to be harvested. The estimate of 1990 wheat production was raised 4 million tons to 108 million while coarse grains are up 1 million tons to 114 million. No changes were made to USDA's area estimates.

FALL SOWING PACE LAGS

Fall seeding for the 1991 crop was about 6 million hectares behind last year's pace as of October 1, 1990. Approximately 85 percent of winter crops are sown for grain while nearly 60 percent of the total winter grain area is devoted to winter wheat.

USSR: WINTER CROP SEEDING PROGRESS

	1989*	1990
	MILLION HECTARES	
August 27	11.0	6.0
September 10	20.4	14.5
October 1	33.7	28.2

*Approximate Equivalent Date

WEATHER AND CROP DEVELOPMENTS

In the European USSR, corn was being harvested during September, while winter grain planting advanced southward. Frequent precipitation (100-184mm) over the Baltic States, Belorussia, the Central Region, and the eastern Black Soils Region produced above-normal rainfall. In some areas, rainfall was as much as four times normal. The wetness, accompanied by unseasonably cool weather, caused small grain harvest delays, reduced grain quality, and hampered planting and establishment of 1991 winter grain crops. Further south, although above-normal precipitation in September over most of the Ukraine, the North Caucasus, and the lower Volga increased topsoil moisture for winter grain planting, it caused only minor delays in corn harvesting. Since early October, wet, cool weather over northern areas continued to create unfavorable conditions for winter grain establishment.

In spring grain areas east of the Volga Valley, below-normal September precipitation covered Kazakhstan and most of West Siberia, creating excellent harvest conditions. Above-normal rainfall over the Urals and parts of East Siberia slowed harvesting. Since early October, increasing precipitation has likely hampered final harvest efforts.

USSR IMPORT ESTIMATES UNCHANGED

USSR grain imports for the 1990/91 marketing year continue to be estimated at 30 million tons. The level of USSR grain imports is believed in part dependent on the amount of domestic grain procurements. Sales of grain to the State moved ahead of last year's pace in mid-September, due in part to a much larger spring grain crop this year in Kazakhstan, a traditional surplus producing region. Recent reports place State grain procurements at over 59 million tons with another 5 million to 8 million tons likely to be delivered to the State. This would compare with total grain procurements in 1989 of 59.5 million tons. This level of procurements would suggest that 1990/91 grain imports could fall well below the 1989/90 level of 38 million tons.

USSR grain buying activity continues relatively subdued. Prospects for a bumper 1990 grain crop, some temporary financial constraints, and the uncertainty caused by economic and political reforms, probably have delayed USSR grain purchases this year. The USSR still has to purchase significant quantities of Canadian grain during the last year of their 5-year agreement in order to meet the minimum purchase commitments of 25 million tons and this encourages speculation about Canadian sales.

U.S. OFFERS WHEAT FLOUR EEP TO USSR

The USDA announced on Sept. 26, 1990, an offer of 500,000 tons of U.S. wheat flour to the Soviet Union under the Export Enhancement Program (EEP). This is the first opportunity the USSR has had to purchase wheat flour under EEP. The USSR has purchased modest amounts of wheat flour from the world market in recent years. But interest in wheat flour purchases has intensified in recent months. This likely reflects an effort to quickly increase the availability of food supplies.

U.S.-USSR LTA UPDATE

The USSR is committed to purchase a minimum of 1 million tons each of U.S. wheat and corn, respectively, during the October-December 1990 period. Also, during this period, the USSR is committed to cover last year's 182,000-ton shortfall in wheat purchases. This quarter represents a transitional period until the new Long Term Grain Agreement (LTA) takes effect on Jan. 1, 1991. It was agreed in recent LTA consultations that any USSR purchases of wheat flour under the recently announced EEP would count (in grain equivalent) against the wheat purchase minimum for the October-December 1990 period and also against the wheat purchase shortfall which was carried forward from the October-September 1989/90 period.

DOMESTIC USE ESTIMATE INCREASED

The estimate of USSR grain utilization has been increased from a month ago to 257 million tons. Actual utilization was increased to a record 221 million tons

AGRICOLA (1979 - 1984) usage is subject to the terms and conditions of the Subscription and License Agreement and the applicable Copyright and intellectual property protection as dictated by the appropriate laws of your country and/or by International Convention.

1 of 4

Marked in Search: #43

TI: USSR grain situation and outlook.

SO: Foreign-Agric-Circ-Grains-FG-U-S-Dep-Agric-Foreign-Agric-Serv. Washington, D.C., The Service. June 11, 1982. (18-82) 7 p.

CN: DNAL 1.943-F7633

LA: English

2 of 4

Marked in Search: #43

TI: USSR grain situation and outlook.

SO: Foreign-Agric-Circ-Grains-FG-U-S-Dep-Agric-Foreign-Agric-Serv. Washington, D.C., The Service. July 13, 1981. (27-81) 9 p. ill.

CN: DNAL 1.943-F7633

LA: English

3 of 4

Marked in Search: #43

TI: USSR grain situation and outlook.

SO: Foreign-Agric-Circ-Grains-FG-U-S-Dep-Agric-Foreign-Agric-Serv. Washington, D.C., The Service. Feb 12, 1981. (7-81) 5 p.

CN: DNAL 1.943-F7633

LA: English

4 of 4

Marked in Search: #43

TI: USSR grain situation and outlook.

SO: Foreign-Agric-Circ-U-S-Dep-Agric-Foreign-Agric-Serv-Grains-FG. Washington, D.C., The Service. July 11, 1980. (20-80) 11 p.

CN: DNAL 1.943-F7633

LA: English

as a shortfall in forage supplies is expected to increase grain for feed utilization. The allowance for dockage and waste has been raised 1 million tons because of the larger crop. The estimate for dockage and waste is 15 percent of production, equaling the highest share ever estimated for this category. The major reason for the large losses this year is the large scale infrastructure problems. The dockage and waste estimate would have been higher still if it were not for very good harvest weather in September in much of the New Lands.

ROUGHAGE PRODUCTION OFF

Production of roughage feeds this year, particularly hay and silage, is running well behind the average of the last few years. This is expected to result in more grain feeding, despite declining animal inventories. Grain feeding is also being boosted as workers on State and collective farms increasingly receive wage payments in the form of grain and use that grain to feed their own livestock.

USSR CIRCULAR TO CEASE PUBLICATION

With this issue, the USSR Grain Situation and Outlook circular is discontinued. In the future, relevant tables on the USSR area, yield, production, and supply-utilization will be carried in the monthly World Grain Situation and Outlook and the World Agriculture Production. The narrative section of these reports will be expanded to cover important developments affecting the USSR grain situation.

USSR Grain Area, Yield, and Production
1975-1989, and 1990 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production ^{1/} (Million) (Metric Tons)
<u>Wheat</u>			
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989	47.6	1.94	92.3
1990 (Projected)	47.5	2.27	108.0
<u>Coarse Grains ^{2/}</u>			
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989	56.0	1.87	104.8
1990 (Projected)	54.0	2.11	114.0
<u>Total Grain ^{3/}</u>			
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989	112.2	1.88	210.9
1990 (Projected)	110.0	2.14	235.0

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1978/79-1990/91

Year	Production	Trade (Jul/June)		Availability 1/ July/June	Total 1/ Seed (Million Metric Tons)				Dockage/ Waste 2/		Feed	Stock Change 3/ July/June
		Imports	Exports		Food	Industrial	Food	Waste 2/				
Total Grains 4/												
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20	
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14	
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1	
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6	
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7	
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6	
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9	
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1	
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7	
1987/88	211.4	32.0	0.5	243	239	25	5	47	30	132	+4	
1988/89	195.1	39.0	0.5	234	235	25	5	48	22	135	-1	
1989/90 5/	210.9	38.0	0.5	249	246	25	5	48	29	139	+2	
Projected 1990/91	235.0	30.0	1.0	264	257	25	5	48	36	143	+7	
Wheat												
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18	
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12	
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1	
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3	
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4	
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4	
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5	
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1	
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5	
1987/88	83.3	21.5	0.5	104	101	11	1	36	13	40	+3	
1988/89	84.4	15.5	0.5	99	100	11	1	37	10	41	-1	
1989/90 5/	92.3	14.0	0.5	106	104	11	1	37	12	42	+2	
Projected 1990/91	108.0	14.0	1.0	121	116	11	1	37	17	50	+5	
Coarse Grains												
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2	
1979/80	81.2	18.4	—	100	102	12	4	7	10	68	-2	
1980/81	80.5	18.0	—	98	101	12	4	7	12	66	-2	
1981/82	69.3	26.0	—	95	98	13	3	7	7	68	-3	
1982/83	91.8	12.5	—	104	101	13	3	7	9	69	+3	
1983/84	101.9	11.5	—	113	112	13	3	7	11	78	+2	
1984/85	90.5	26.9	—	117	114	12	4	7	10	81	+4	
1985/86	100.0	13.7	—	114	114	12	4	7	9	82	—	
1986/87	105.9	11.0	—	117	115	13	4	7	11	80	+2	
1987/88	113.7	10.0	—	124	123	13	4	7	15	84	+1	
1988/89	97.5	23.0	—	121	121	13	4	7	11	86	—	
1989/90 5/	104.8	23.0	—	128	128	13	4	7	15	89	—	
Projected 1990/91	114.0	15.0	—	129	127	13	4	7	17	86	+2	

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

- Then **AgExporter**—USDA's fact-filled monthly agricultural trade magazine—is for you. Based on official USDA data available nowhere else, **AgExporter** articles are clear and crisp, written to provide the export information you need, in a concise and extremely readable form.

In addition, periodic special issues—such as the one devoted entirely to the 10 steps to marketing success—give you a wide range of detailed information about overseas markets.

Subscribe today!



Check One:

- Send a check for the total amount payable to the Foreign Agricultural Service.
Only checks on U.S. banks, cashier's checks, or money orders will be accepted.
No refunds can be made.

Mail this to:
Foreign Agricultural Service
Room 4642-S
U.S. Department of Agriculture
Washington, D.C. 20250-1000

Please print or type

Name (last, first, middle initial)

[illegible]

Organization or Firm

[illegible]

Street or P.O. Box Number

[illegible]

City

[illegible]

Country

State

Zip Code

[illegible]

FAS Circulars: Market Information For Agricultural Exporters

As an agricultural exporter, you need timely, reliable information on changing consumer preferences, needs of foreign buyers, and the supply and demand situation in countries around the world.

The Foreign Agricultural Service can provide that information in its commodity circulars.

World agricultural information and updates on special FAS export services for the food and agricultural trade all are available in these periodic circulars.

For a sample copy of these reports—which can supply you with the information you need to make sound business decisions—check the box indicated, fill out the address form, and mail it today.

To subscribe: Indicate which publications you want. Send a check for the total amount payable to the Foreign Agricultural Service. Only checks on U.S. banks, cashier's checks, or international money orders will be accepted. NO REFUNDS CAN BE MADE.

Mail this form to: Foreign Agricultural Service
Information Division
Room 4644-S
U.S. Department of Agriculture
Washington, D.C. 20250-1000

No. of Subscriptions		Subscription Rate	
		Domestic	Foreign
_____	10002 Agricultural Trade Highlights (12 issues)	\$15.00	\$23.00
_____	10022 World Cocoa Situation (2 issues)	5.00	7.00
_____	10003 World Coffee Situation (3 issues)	7.00	12.00
_____	10004 World Cotton Situation (12 issues)	24.00	35.00
Dairy, Livestock & Poultry:			
_____	10005 Dairy, Livestock & Poultry: Export Trade & Prospects (12 issues)	28.00	56.00
_____	10006 Meat & Dairy Monthly Imports (12 issues)	22.00	28.00
_____	10007 World Dairy Situation (2 issues)	5.00	8.00
_____	10008 World Livestock Situation (2 issues); World Poultry Situation (2 issues)	8.00	13.00
_____	10009 All 30 Dairy, Livestock & Poultry Reports	63.00	105.00
Grain:			
_____	10010 World Grain Situation & Outlook (12 issues)	24.00	35.00
_____	10011 Export Markets for U.S. Grain & Products (12 issues)	24.00	35.00
_____	10013 USSR Grain Situation & outlook (8 issues)	12.00	18.00
_____	10014 All 32 Grain Reports	60.00	88.00
_____	10015 Horticultural Products Review (12 issues)	24.00	35.00
_____	10016 World Oilseed Situation & Market Highlights (12 issues)	28.00	56.00
_____	10017 U.S. Seed Exports (4 issues)	12.00	20.00
_____	10018 World Sugar and Molasses Situation & Outlook; World Honey Situation (3 issues)	7.00	10.00
_____	10019 World Tea Situation; U.S. Spice Trade; U.S. Essential Oil Trade (3 issues)	7.00	12.00
_____	10020 World Tobacco Situation (12 issues)	26.00	45.00
_____	10021 World Agricultural Production (12 issues)	24.00	35.00
_____	10023 Wood Products: International Trade and Foreign Markets (4 issues)	10.00	15.00

Total Reports Ordered Total Subscription Price _____

☐ Please send me a sample copy.

Enclosed is my Check for \$ _____ Made Payable to Foreign Agricultural Service.

Name (Last, first, middle initial)

Organization or Firm

Street or P.O. Box Number

CityStateZip Code

CountryPhone No. ()

UNITED STATES DEPARTMENT OF AGRICULTURE

Foreign Agricultural Service
Room 4644-S
WASHINGTON, D.C. 20250—1000

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, \$300

FIRST-CLASS MAIL
POSTAGE & FEES PAID
USDA-FAS
WASHINGTON, D.C.
PERMIT No. G-262

If your address should be changed _____ PRINT
OR TYPE the new address, including ZIP CODE and
return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 4644 So.
U.S. Department of Agriculture
Washington, D. C. 20250.



USSR Grain Situation and Outlook

Circular Series

SG 6-90

September 1990

Crop Estimate Unchanged

The 1990 Soviet grain crop estimate remains unchanged at 230 million tons, including 104 million wheat, 113 million coarse grains and 13 million miscellaneous grains and pulses. The total grain area estimate remains at 110 million hectares. Preliminary yields indicate a record-to-near record crop from many oblasts/regions. Unlike last year when crop prospects were good in the European USSR and poor in the New Lands, the yields appear to be favorable nearly everywhere this year.

By September 3, 1990 a reported 160 million tons of small grains and pulses had been threshed from 61.7 million hectares on collective and state farms. This compares with about 167 million tons threshed from 87.1 million hectares at about this time a year ago. This pace is nearly 20 percent behind last year on the same date. This slow pace is due not only to the bumper crop but also shortages of fuel, labor, and equipment. The report indicated that the 61.7 million hectares threshed represented 62 percent of the small grain and pulse area on state and collective farms. (Total Soviet grain area also includes the area in corn and on military, private, and other farms, which are excluded from the harvest progress reports.)

Soviet state procurements of grain from farms, as of September 3, were 46.3 million tons about the same as the slow pace in 1989. In recent years, state and collective farms have been increasingly reluctant to sell grain to the state because prices received for grain relative to state mixed feed prices often were not attractive, particularly in low cost grain areas such as the Ukraine and North Caucasus. In addition oblast and republic administrators are interested in having farms retain their grain and feed it to livestock. A relatively small portion of livestock commodities enters the All-Union Fund, whereas virtually all grain sold by farms enters this Fund and is controlled by Moscow rather than the republics. If only because of the sheer size of this year's harvest, state procurements are expected to exceed those of last year (59.5 million tons) by at least 10 percent. Neither the higher ruble procurement prices for grain announced this year, nor the much-publicized hard currency payments for grain announced last year and increased this year, appear to be having much impact on farms' grain selling practices.

Weather and Crop Developments

In the European USSR, the harvest continued to progress slowly in August, while planting of the 1991 winter grain crop began in northern areas. Frequent rains began on August 12 and continued throughout the month over the Baltic States, eastern Belorussia, the Central Region, Black Soils Region, Volga Vyatsk, and the upper Volga, producing near to above-normal precipitation for the month. The rain was accompanied by a steady cooling trend, causing major delays in the small grain harvest and slowing fieldwork for winter grain planting. Further south, well below-normal August precipitation over Moldavia, the southern Ukraine, and the north Caucasus limited moisture for filling corn but allowed the completion of the small grains harvest. Since early September, wet, cool weather over northern areas further delayed fieldwork.

In crop areas east of the Volga Valley, above-normal precipitation in August over the Urals and the eastern portion of Western Siberia benefited spring grains which advanced through the filling stage. In Kazakhstan, below-normal precipitation and near-normal temperatures favored crop maturation. Since early September however, widespread rain over northern areas delayed early spring grain harvesting. Light rain in Kazakhstan caused only brief harvest delays.

Import Estimate Unchanged

The estimate of USSR grain imports for 1990/91 at 30 million tons is unchanged from a month ago. USSR grain buying activity has been slow to develop this marketing year. Prospects for a large 1990 grain harvest and Soviet insistence that exporting countries offer credit on grain sales may be contributing to the delayed start of the 1990/91 grain import program. In recent years, around 90 percent of the USSR's annual grain imports have moved in the October-June period. This is likely to happen again in 1990/91. However, the virtual absence of sales to the USSR for October-forward delivery this year has to be of concern to the worlds' major exporters.

The USSR is projected to import 14 million tons of wheat in 1990/91, about the same level as in the previous 2 years. Reflecting the price relationship between wheat and corn, feed quality wheat is expected to account for a larger share of this years' import program. The bulk of the Soviet Union's 1990/91 wheat imports are likely to be covered by various trading agreements or arrangements. Shipments by the U.S., Canada, Australia, France and Hungary, each with a grain trade understanding with the USSR, should cover nearly 90 percent of the USSR's 1990/91 imports.

Reflecting a near record 1990/91 USSR coarse grain harvest and increased competition from wheat in the world grain for feed market, USSR coarse grain imports are projected at only 15 million tons in 1990/91. This is well below the level of the past 2 years, corn is again expected to dominate the USSR coarse grain import program with the United States, China and Argentina the major suppliers.

Record Domestic Use

The estimate of USSR grain utilization is unchanged from a month ago. Actual grain use is currently projected at a record high of 219 million tons. Transportation and storage problems resulting from weakness in the grain handling infrastructure and increasing reliance on barter trade among regions have been exacerbated this year because of the unusually large size of the crop. Losses associated with dockage and waste are expected to be exceptionally large, 15 percent of bunker weight grain production, or 35 million tons.

USSR Grain Area, Yield, and Production
1975-1989, and 1990 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production ^{1/} (Million) (Metric Tons)
<u>Wheat</u>			
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989	47.6	1.94	92.3
1990 (Projected)	47.5	2.19	104.0
<u>Coarse Grains ^{2/}</u>			
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989	56.0	1.87	104.8
1990 (Projected)	54.0	2.09	113.0
<u>Total Grain ^{3/}</u>			
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989	112.2	1.88	210.9
1990 (Projected)	110.0	2.09	230.0

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1978/79-1990/91

Year	Production	Trade (Jul/Jun)		Availability 1/ July/June	Total 1/ Seed (Million Metric Tons)			Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
		Imports	Exports		Total Grains 4/							
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20	
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14	
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1	
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6	
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7	
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6	
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9	
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1	
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7	
1987/88	211.4	32.0	0.5	243	239	25	5	47	30	132	+4	
1988/89	195.1	39.0	0.5	234	235	25	5	48	22	135	-1	
1989/90 5/	210.9	38.0	0.5	249	246	25	5	48	29	139	+2	
Projected 1990/91	230.0	30.0	1.0	259	254	25	5	48	35	141	+5	
Wheat												
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18	
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12	
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1	
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3	
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4	
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4	
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5	
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1	
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5	
1987/88	83.3	21.5	0.5	104	101	11	1	36	13	40	+3	
1988/89	84.4	15.5	0.5	99	100	11	1	37	10	41	-1	
1989/90 5/	92.3	14.0	0.5	106	104	11	1	37	12	42	+2	
Projected 1990/91	104.0	14.0	1.0	117	114	11	1	37	16	49	+3	
Coarse Grains												
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2	
1979/80	81.2	18.4	—	100	102	12	4	7	10	68	-2	
1980/81	80.5	18.0	—	98	101	12	4	7	12	66	-2	
1981/82	69.3	26.0	—	95	98	13	3	7	7	68	-3	
1982/83	91.8	12.5	—	104	101	13	3	7	9	69	+3	
1983/84	101.9	11.5	—	113	112	13	3	7	11	78	+2	
1984/85	90.5	26.9	—	117	114	12	4	7	10	81	+4	
1985/86	100.0	13.7	—	114	114	12	4	7	9	82	—	
1986/87	105.9	11.0	—	117	115	13	4	7	11	80	+2	
1987/88	113.7	10.0	—	124	123	13	4	7	15	84	+1	
1988/89	97.5	23.0	—	121	121	13	4	7	11	86	—	
1989/90 5/	104.8	23.0	—	128	128	13	4	7	15	89	—	
Projected 1990/91	113.0	15.0	—	128	126	13	4	7	17	85	+2	

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

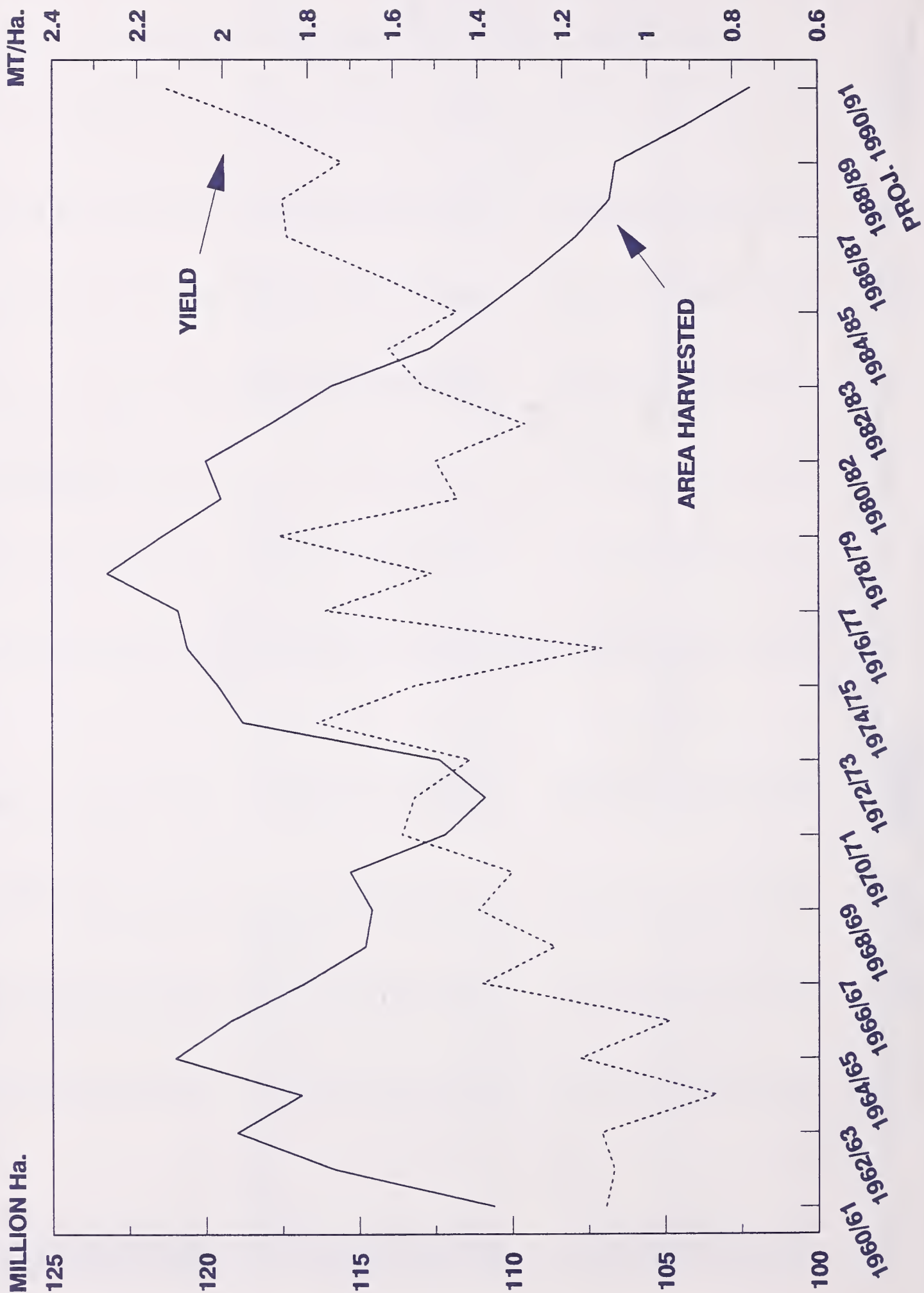
2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

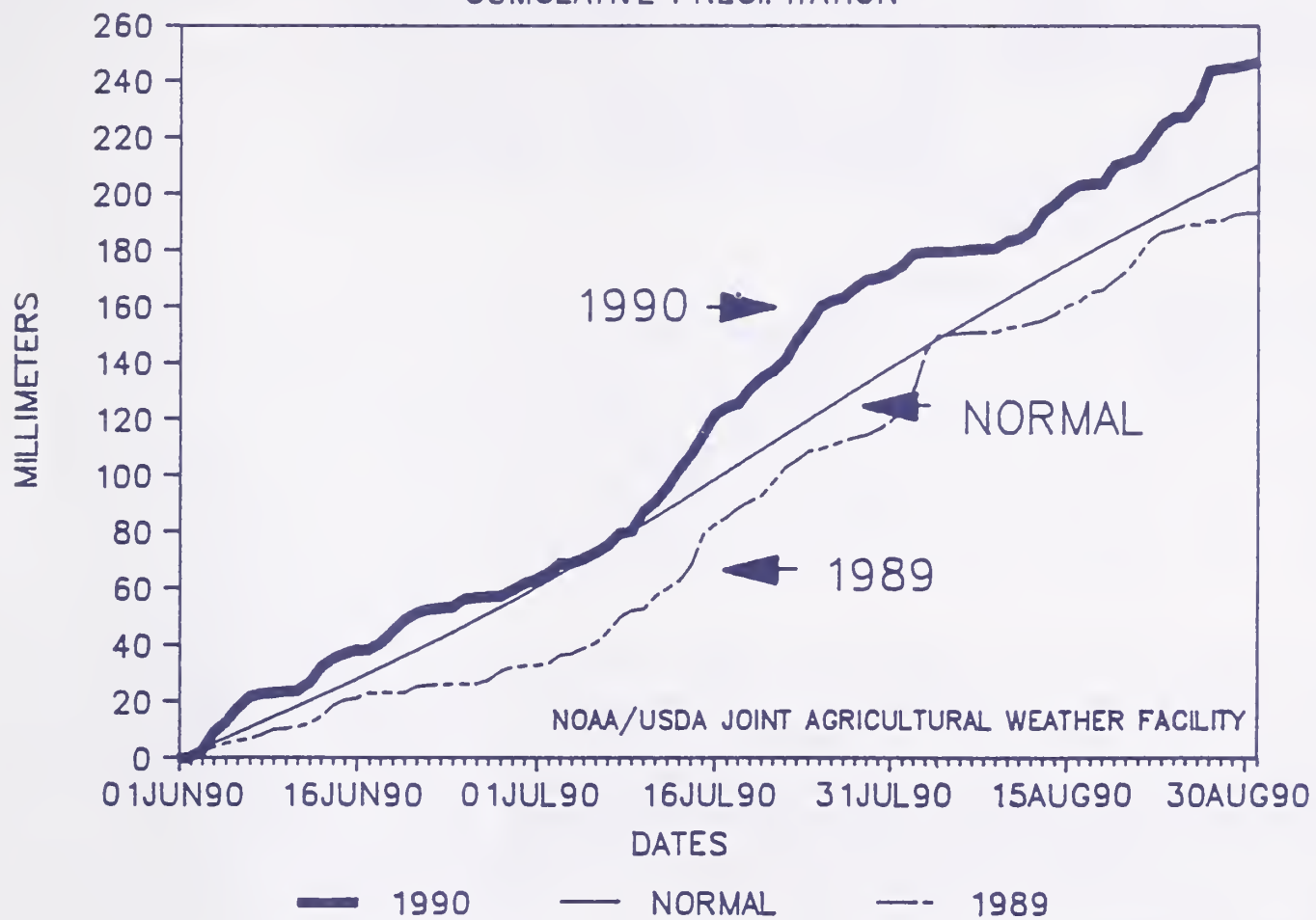
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR WHEAT AND COARSE GRAINS: AREA HARVESTED AND YIELD



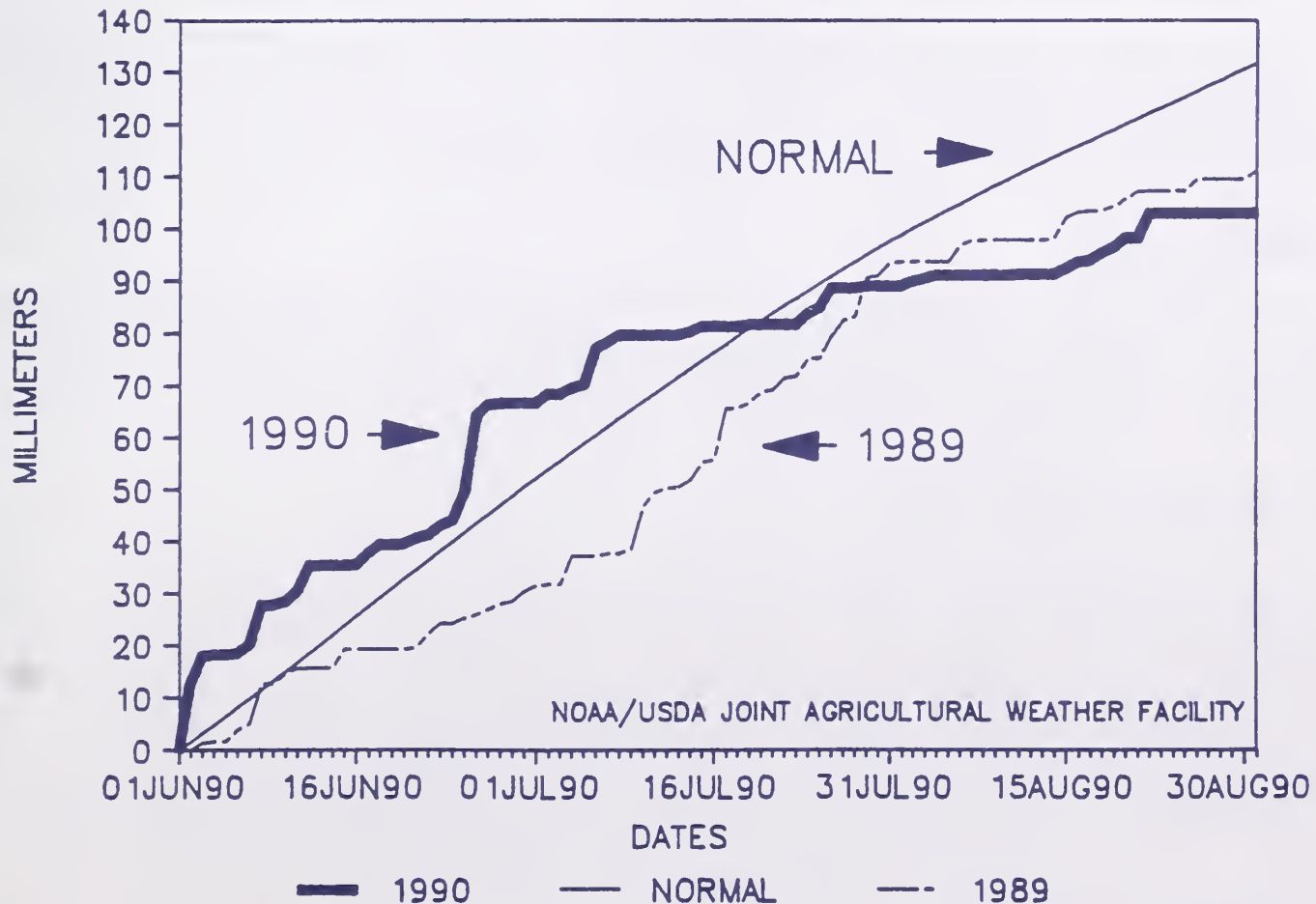
NORTHWEST AND CENTRAL REGIONS

CUMULATIVE PRECIPITATION



SOUTH CENTRAL UKRAINE

CUMULATIVE PRECIPITATION



UNITED STATES DEPARTMENT OF AGRICULTURE

Foreign Agricultural Service
Room 4644-S
WASHINGTON, D.C. 20250-1000

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, \$300

FIRST-CLASS MAIL
POSTAGE & FEES PAID
USDA-FAS
WASHINGTON, D.C.
PERMIT No. G-262

If your address should be changed _____ PRINT
OR TYPE the new address, including ZIP CODE and
return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 4644 So.
U.S. Department of Agriculture
Washington, D. C. 20250.

= = = = =
= The summary of this report and other statistical, economic, marketing, and =
= news reports are available within minutes of their release through USDA's =
= EDI SERVICE. For more information, call or write Russell Forte, Office of =
= Governmental and Public Affairs, USDA, Room 536-A, Administration Building, =
= Washington, D.C. 20250, tel. (202) 447-5505. =
= = = =

HOW TO SUBSCRIBE

"USSR Grain Situation and Outlook" circulars are issued 8 times per year.
They are available on a subscription basis for \$12 in the United States or
\$18 for foreign addresses.

To subscribe, send your check, payable to the Foreign Agricultural Service,
to: Information Division, FAS, USDA, Room 4644-South Building, Washington,
D.C. 20250-1000. Only checks drawn on U.S. banks, cashier's checks, or
international money orders will be accepted. NO REFUNDS CAN BE MADE.

HOW TO RENEW

You will receive notification about 60 days before your annual subscription
expires. To prevent a lapse in service, promptly return your renewal form
and payment. **Inquiries:** If you have a question about your subscription,
write to the above address or call (202) 382-9445.

HOW TO OBTAIN DATABASE TAPES

Agricultural production, supply and distribution database tapes are
available on a one-time or subscription basis from the National Technical
Information Service of the U.S. Department of Commerce. The tapes are
updated quarterly and contain data for many commodities and countries from
1960 to the present. Each tape costs \$203 for domestic and \$404 for
foreign orders, including airmail, handling and shipping charges. Use
order number PB 88-149570 and specify the recording density desired. Write
to NTIS, 5285 Port Royal Road, Springfield, Virginia 22161, or call (703)
487-4650 to obtain the most current tape or (703) 487-4763 for a
subscription.

4 AD 9072
568477
Reserve

5

USSR Grain Situation and Outlook



United States
Department of
Agriculture

Foreign
Agricultural
Service

Circular Series

SG 4-90

July 1990

The 1990 Soviet grain crop continues to be estimated at 215 million tons from a total area of 112 million hectares. The production estimate includes 95 million tons of wheat, 106.5 million of coarse grains, and 13.5 million of miscellaneous grains and pulses. Harvesting has begun in some of the southern parts of the USSR, however, no countrywide reports on progress have been issued. Production figures of grain by type for 1989 remain USDA estimates pending publication of these figures by the USSR.

Weather and Crop Developments

In the European USSR, weather conditions in June continued mostly favorable for winter grains which advanced through reproduction in the north and were mostly filling in the south. Spring barley advanced through reproduction in the south. Near-to above-normal precipitation covered most areas with more than double the normal rainfall over the lower and middle Volga Valley. Although June's precipitation was mostly beneficial, locally heavy downpours along with gusty winds over the western and central Ukraine caused some lodging. June temperatures were 1 to 3 degrees Celsius below-normal over the European USSR. However, during July 1-7, the hottest weather so far this season covered the southern Ukraine and the North Caucasus. Maximum temperatures ranging from 33 to 40 degrees C hastened winter and spring grain maturation. Winter grain harvesting was just getting underway in early July.

In crop areas east of the Volga Valley, above-normal precipitation in June over the northern Urals provided abundant moisture for spring grains in the vegetative state. Well below-normal precipitation over minor spring grain producing areas in eastern Kazakhstan and southeastern areas in Western Siberia was accompanied by periodic heat, which accelerated crop development and placed increased stress on crops approaching the heading stage. Although above-normal temperatures covered the major spring grain producing areas in central Kazakhstan and Western Siberia, soil moisture reserves helped to minimize potential stress. Since early July, widespread rain and cooler weather improved growing conditions for spring grains in or nearing reproduction.

Total Import Estimate Unchanged But Wheat Increased

The estimate of total USSR grain imports for 1990/91 delivery of 36 million tons is unchanged from a month ago. However, an expected further narrowing of the price spread between lower quality wheats and corn is likely to result in larger USSR feed quality wheat imports in the year ahead. Reflecting this, the estimate of USSR wheat imports has been increased by a million tons to 17 million, the largest since 1987/88. The estimate of coarse grain imports, has been reduced by a million tons to 18 million.

The 1986/87 marketing year was the most recent year of significant USSR feed quality wheat purchases. Reportedly, in that year the USSR, imported nearly 2 million tons of Canadian feed wheat and around 3 million tons of EC feed quality wheat. Recent export quotes for lower quality wheat have been quite competitive with corn and USSR feed wheat imports in 1990/91 could approximate or even exceed the 1986/87 level. So far in 1990/91, USSR purchases of either milling or feed quality wheat have been limited.

USSR grain buying activity continued slow over the past month. However, recent shipping reports confirm some recently reported business, including modest new crop Argentine sorghum sales. In addition, a sharp pickup in Canadian wheat shipments in May suggest that the Canadians may have negotiated a sizable late season sale to the USSR with shipments likely to continue through July. A review of EC shipping data indicates that the earlier delay in movement of French grain to the USSR may result in some slippage of the 1989/90 export campaign into 1990/91.

Domestic Use Estimate Revised

In order to accommodate this month's adjustments in the 1990/91 import forecast the estimate of feed utilization of wheat has been increased with a corresponding reduction in coarse grain feed use. Other utilization estimates and the estimate of stock change are unchanged from a month ago.

USSR Grain Area, Yield, and Production
1975-1989, and 1990 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production ^{1/} (Million) (Metric Tons)
<u>Wheat</u>			
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Preliminary)	47.5	1.91	90.5
1990 (Projected)	48.0	1.98	95.0
<u>Coarse Grains ^{2/}</u>			
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Preliminary)	55.9	1.91	107.0
1990 (Projected)	55.0	1.92	106.5
<u>Total Grain ^{3/}</u>			
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Preliminary)	112.0	1.88	211.1
1990 (Projected)	112.0	1.92	215.0

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

Year	Production	Trade (Jul/Jun)		Availability 1/ July/June	Total 1/ Seed (Million Metric Tons)				Dockage/ Waste 2/		Feed	Stock Change 3/ July/June
		Imports	Exports		Total 1/ Seed	Industrial	Food					
Total Grains 4/												
1978/79	237.4	15.6	2.8	250	230	6	46	28		125	+20	
1979/80	179.2	31.0	0.8	209	223	6	46	22		123	-14	
1980/81	189.1	34.8	0.5	223	224	6	46	28		119	-1	
1981/82	158.2	47.3	0.5	205	211	5	47	16		118	-6	
1982/83	186.8	34.3	0.5	221	214	5	47	19		118	+7	
1983/84	192.2	32.5	0.5	224	218	5	47	21		120	+6	
1984/85	172.6	55.5	0.5	228	219	6	47	19		123	+9	
1985/86	191.7	29.9	0.5	221	220	5	47	18		126	+1	
1986/87	210.1	27.5	0.5	237	230	5	47	23		130	+7	
1987/88	211.4	32.0	0.5	243	239	5	47	30		132	+4	
1988/89	195.1	39.0	0.5	234	235	5	48	22		135	-1	
1989/90 5/	211.1	38.0	0.5	249	246	5	48	29		139	+2	
Projected 1990/91	215.0	36.0	1.0	250	248	5	48	29		141	+2	
Wheat												
1978/79	120.9	5.1	1.5	124	107	2	35	14		43	+18	
1979/80	90.2	12.0	0.5	102	114	2	35	11		53	-12	
1980/81	98.2	16.0	0.5	114	113	2	35	15		48	+1	
1981/82	81.1	20.3	0.5	101	104	2	36	8		47	-3	
1982/83	84.3	20.8	0.5	105	101	2	36	9		43	+4	
1983/84	77.5	20.5	0.5	98	93	2	36	9		35	+4	
1984/85	68.6	28.1	0.5	96	91	2	36	8		35	+5	
1985/86	78.1	15.7	0.5	93	92	1	36	8		36	+1	
1986/87	92.3	16.0	0.5	108	103	1	36	10		45	+5	
1987/88	83.3	21.5	0.5	104	101	1	36	13		40	+3	
1988/89	84.4	15.5	0.5	99	100	1	37	10		41	-1	
1989/90 5/	90.5	14.0	0.5	104	102	1	37	12		40	+2	
Projected 1990/91	95.0	17.0	1.0	111	109	1	37	12		48	+2	
Coarse Grains												
1978/79	105.4	10.0	1.0	114	112	4	7	13		79	+2	
1979/80	81.2	18.4	—	100	102	4	7	10		68	-2	
1980/81	80.5	18.0	—	98	101	4	7	12		66	-2	
1981/82	69.3	26.0	—	95	98	3	7	7		68	-3	
1982/83	91.8	12.5	—	104	101	3	7	9		69	+3	
1983/84	101.9	11.5	—	113	112	3	7	11		78	+2	
1984/85	90.5	26.9	—	117	114	4	7	10		81	+4	
1985/86	100.0	13.7	—	114	114	4	7	9		82	—	
1986/87	105.9	11.0	—	117	115	4	7	11		80	+2	
1987/88	113.7	10.0	—	124	123	4	7	15		84	+1	
1988/89	97.5	23.0	—	121	121	4	7	11		86	—	
1989/90 5/	107.0	23.0	—	130	130	4	7	15		91	—	
Projected 1990/91	106.5	18.0	—	125	125	4	7	15		86	—	

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports ^{1/}
By Country of Origin by Months
(1,000 Tons)

	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total ^{2/}
January 1987	---	383	153	642	75	1,253	
February	---	207	101	1,140	330	1,778	
March	316	497	134	1,165	303	2,415	
Jan-March	316	1,087	388	2,947	708	5,446	6,400
April	1,753	1,018	129	1,452	765	5,117	
May	1,840	777	123	1,050	412	4,202	
June	193	11	13	150	40	407	
April-June	3,786	1,806	265	2,652	1,217	9,726	12,400
July	1,915	---	---	59	10	1,984	
August	1,064	---	---	---	---	1,089	
September	316	74	---	---	---	415	
July-September	3,295	74	---	59	10	3,488	4,600
October	---	872	---	540	---	1,422	
November	525	357	---	708	---	1,607	
December	1,703	332	---	435	---	2,485	
October-December	2,228	1,561	---	1,683	---	5,514	6,500
January 1988	1,852	72	---	647	---	2,571	
February	1,746	93	---	764	135	2,738	
March	2,255	101	---	924	486	3,766	
Jan-March	5,853	366	---	2,335	621	9,075	10,000
April	2,406	713	---	275	332	3,726	
May	1,995	1,123	---	180	6	3,304	
June	755	898	---	235	---	1,888	
April-June	5,156	2,734	---	690	338	8,918	10,400
July	375	131	---	53	35	594	
August	804	---	---	15	175	994	
September	344	126	---	1	4	475	
July-September	1,523	257	---	69	214	2,063	2,600
October	1,935	524	---	480	264	3,203	
November	1,529	341	15	1,011	114	3,010	
December	1,585	261	---	1,422	47	3,315	
October-December	5,049	1,126	15	2,913	425	9,528	10,800
January 1989	2,234	316	---	633	43	3,226	
February	2,631	172	---	861	23	3,687	
March	3,115	81	---	954	202	4,352	
Jan-March	7,980	569	---	2,448	268	11,265	12,100
April	2,105	371	80	1,500	182	4,238	
May	3,061	351	104	650	221	4,387	
June	2,752	60	66	450	66	3,394	
April-June	7,918	782	250	2,600	469	12,019	13,500
July	1,408	49	---	206	---	1,663	
August	389	---	---	26	---	415	
September	---	---	---	37	---	37	
July-September	1,797	49	---	269	---	2,115	2,900
October	805	---	---	102	---	907	
November	3,497	397	---	460	---	4,348	
December	3,145	302	---	311 ^{3/}	---	3,758	
October-December	7,447	699	---	867 ^{3/}	---	9,013	10,000
January 1990	2,314	519	19	900 ^{3/}	92	3,844	
February	1,786	347	31	1,300 ^{3/}	200	3,664	
March	1,838	448	6	750 ^{3/}	227	3,269	
Jan-March	5,938	1,314	56	2,950 ^{3/}	519	10,777	11,500
April	2,145	879	---	1,000 ^{3/}	35	4,059	
May	1,796	1,121	---	NA	173	3,090	
June	NA	NA	---	NA	NA	---	

^{1/} Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

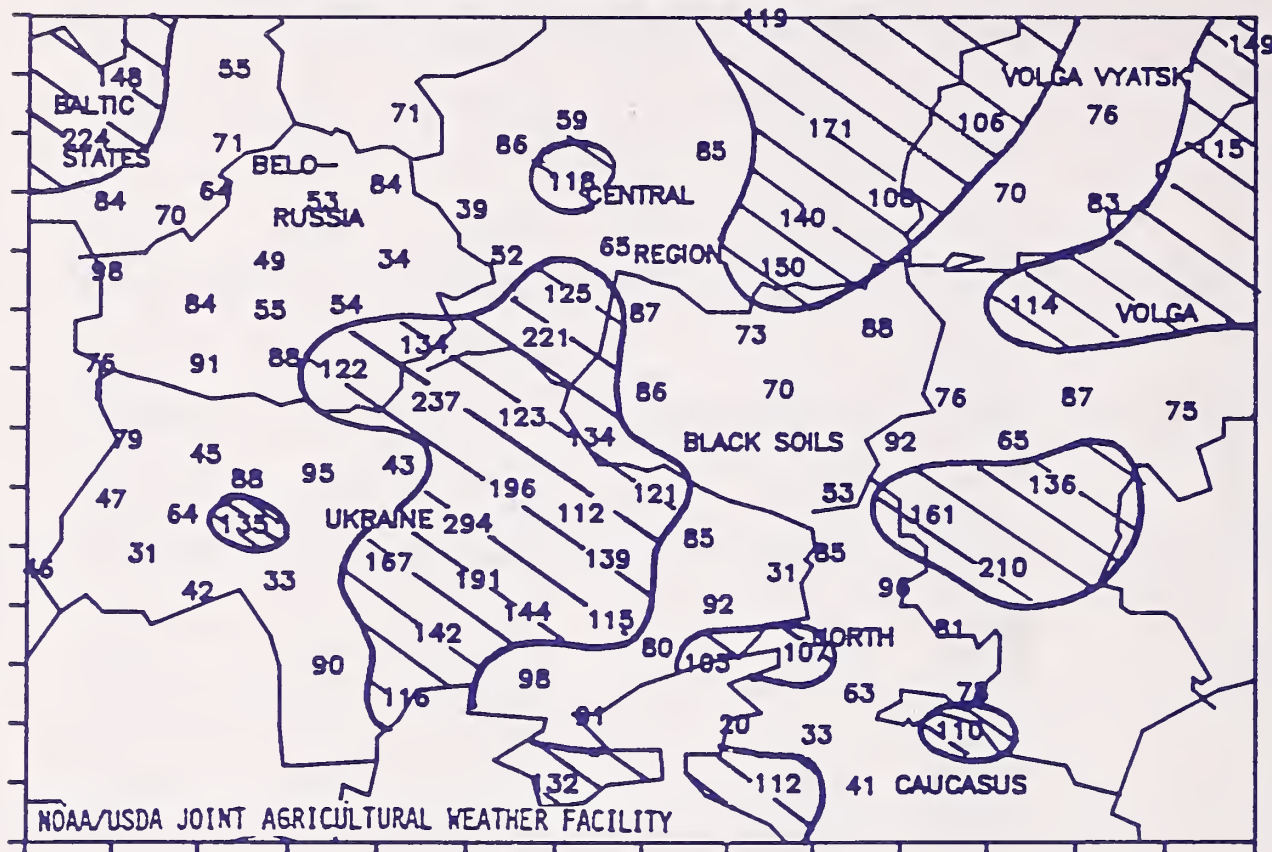
^{2/} Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

^{3/} Preliminary

N/A Not Available

WESTERN USSR: MAY 1 – JUNE 30

PRECIPITATION: 1990 AS PERCENT OF 1989



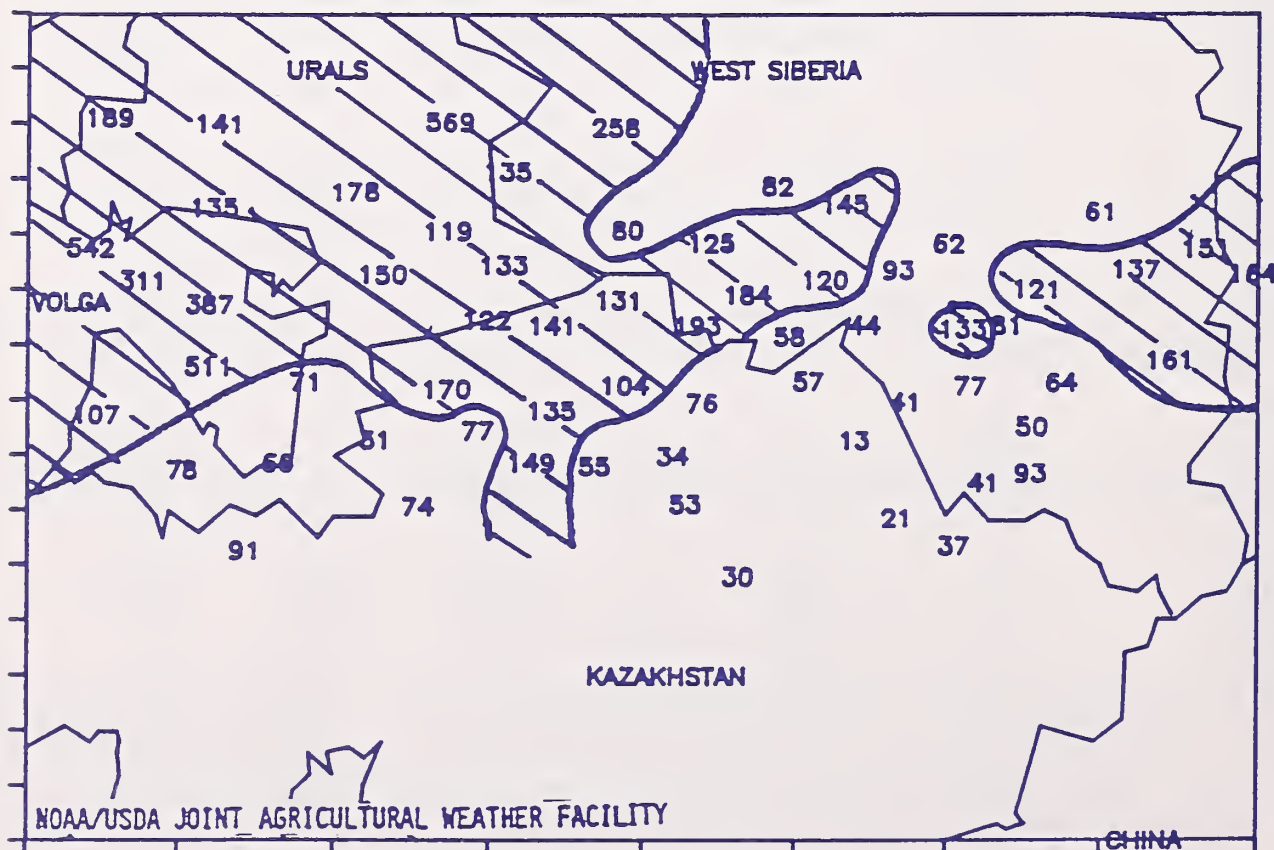
ABOVE 1989



BELOW 1989

NEW LANDS: MAY 1 – JUNE 30

PRECIPITATION: 1990 AS PERCENT OF 1989



FAS Circulars: Market Information For Agricultural Exporters

As an agricultural exporter, you need timely, reliable information on changing consumer preferences, needs of foreign buyers, and the supply and demand situation in countries around the world.

The Foreign Agricultural Service can provide that information in its commodity circulars.

World agricultural information and updates on special FAS export services for the food and agricultural trade all are available in these periodic circulars.

For a sample copy of these reports—which can supply you with the information you need to make sound business decisions—check the box indicated, fill out the address form, and mail it today.

To subscribe: Indicate which publications you want. Send a check for the total amount payable to the Foreign Agricultural Service. Only checks on U.S. banks, cashier's checks, or international money orders will be accepted. NO REFUNDS CAN BE MADE.

Mail this form to: Foreign Agricultural Service
Information Division
Room 4644-S
U.S. Department of Agriculture
Washington, D.C. 20250-1000

No. of Subscriptions		Subscription Rate	
		Domestic	Foreign
_____	10002 Agricultural Trade Highlights (12 issues)	\$15.00	\$23.00
_____	10022 World Cocoa Situation (2 issues)	5.00	7.00
_____	10003 World Coffee Situation (3 issues)	7.00	12.00
_____	10004 World Cotton Situation (12 issues)	24.00	35.00
Dairy, Livestock & Poultry:			
_____	10005 Dairy, Livestock & Poultry: Export Trade & Prospects (12 issues)	28.00	56.00
_____	10006 Meat & Dairy Monthly Imports (12 issues)	22.00	28.00
_____	10007 World Dairy Situation (2 issues)	5.00	8.00
_____	10008 World Livestock Situation (2 issues); World Poultry Situation (2 issues)	8.00	13.00
_____	10009 All 30 Dairy, Livestock & Poultry Reports	63.00	105.00
Grain:			
_____	10010 World Grain Situation & Outlook (12 issues)	24.00	35.00
_____	10011 Export Markets for U.S. Grain & Products (12 issues)	24.00	35.00
_____	10013 USSR Grain Situation & outlook (8 issues)	12.00	18.00
_____	10014 All 32 Grain Reports	60.00	88.00
_____	10015 Horticultural Products Review (12 issues)	24.00	35.00
_____	10016 World Oilseed Situation & Market Highlights (12 issues)	28.00	56.00
_____	10017 U.S. Seed Exports (4 issues)	12.00	20.00
_____	10018 World Sugar and Molasses Situation & Outlook; World Honey Situation (3 issues)	7.00	10.00
_____	10019 World Tea Situation; U.S. Spice Trade; U.S. Essential Oil Trade (3 issues)	7.00	12.00
_____	10020 World Tobacco Situation (12 issues)	26.00	45.00
_____	10021 World Agricultural Production (12 issues)	24.00	35.00
_____	10023 Wood Products: International Trade and Foreign Markets (4 issues)	10.00	15.00

Total Reports Ordered

Total Subscription Price _____

☐ Please send me a sample copy.

Enclosed is my Check for \$ _____ Made Payable to Foreign Agricultural Service.

Name (Last, first, middle initial)

Organization or Firm

Street or P.O. Box Number

City

State

Zip Code

Country

Phone No. () _____

UNITED STATES DEPARTMENT OF AGRICULTURE

Foreign Agricultural Service
Room 4644-S
WASHINGTON, D.C. 20250-1000

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, \$300

FIRST-CLASS MAIL
POSTAGE & FEES PAID
USDA-FAS
WASHINGTON, D.C.
PERMIT No. G-262

If your address should be changed _____ PRINT
OR TYPE the new address, including ZIP CODE and
return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 4644 So.
U.S. Department of Agriculture
Washington, D. C. 20250.

= = = = =
= The summary of this report and other statistical, economic, marketing, and =
= news reports are available within minutes of their release through USDA's =
= EDI SERVICE. For more information, call or write Russell Forte, Office of =
= Governmental and Public Affairs, USDA, Room 536-A, Administration Building, =
= Washington, D.C. 20250, tel. (202) 447-5505. =
= = = =

HOW TO SUBSCRIBE

"USSR Grain Situation and Outlook" circulars are issued 8 times per year. They are available on a subscription basis for \$12 in the United States or \$18 for foreign addresses.

To subscribe, send your check, payable to the Foreign Agricultural Service, to: Information Division, FAS, USDA, Room 4644-South Building, Washington, D.C. 20250-1000. Only checks drawn on U.S. banks, cashier's checks, or international money orders will be accepted. NO REFUNDS CAN BE MADE.

HOW TO RENEW

You will receive notification about 60 days before your annual subscription expires. To prevent a lapse in service, promptly return your renewal form and payment. **Inquiries:** If you have a question about your subscription, write to the above address or call (202) 382-9445.

HOW TO OBTAIN DATABASE TAPES

Agricultural production, supply and distribution database tapes are available on a one-time or subscription basis from the National Technical Information Service of the U.S. Department of Commerce. The tapes are updated quarterly and contain data for many commodities and countries from 1960 to the present. Each tape costs \$203 for domestic and \$404 for foreign orders, including airmail, handling and shipping charges. Use order number PB 88-149570 and specify the recording density desired. Write to NTIS, 5285 Port Royal Road, Springfield, Virginia 22161, or call (703) 487-4650 to obtain the most current tape or (703) 487-4763 for a subscription.



United States
Department of
Agriculture

Foreign
Agricultural
Service

Circular Series

SG 3-90

June 1990

USSR Grain Situation and Outlook

The projection of 1990 USSR grain production remains unchanged at 215 million tons, including 95.0 million for wheat, 106.5 million for coarse grains, and 13.5 million for miscellaneous grains and pulses. Projected total grain area also remains unchanged at 112 million hectares. Since the USSR has not published final 1989 grain figures, the 1989 production estimates for grain by type remain USDA estimates.

Weather and Crop Developments

In May, weather conditions in the European USSR continued mostly favorable for crops. Above-normal precipitation covered the western North Caucasus and the Volga Valley, benefiting winter grains in or nearing the heading stage. Winter grains entered the reproductive phase of development over most of the Ukraine and North Caucasus by month's end. Crop progress for spring grains ranged from emergence to tillering in the north, to jointing in the south. Although May's precipitation was below normal in the Baltic States, Belorussia, and the Black Soils Region, adequate soil moisture reserves met increasing crop-moisture demands. Soil moisture reserves were limited in the southern Ukraine and the Crimea where precipitation in May was below normal. Monthly average temperatures were 1 to 3 degrees C below normal over the eastern two-thirds of the European USSR. A brief episode of frost covered the southern Black Soils Region, the eastern Ukraine, and the northern North Caucasus on May 22; however, little damage is expected.

Since early June, wet weather reversed May's dryness in the Baltic States and Belorussia. Continued unseasonably cool weather over the European USSR slowed crop development.

In crop areas east of the Ural mountains, spring grains are normally planted during May. The combination of well-above-normal precipitation in May and melting snow in the Urals produced local flooding. Although this wet weather provided abundant moisture for spring grain planting, it likely caused some planting delays. Below-normal precipitation over southern Kazakhstan and eastern areas of Western Siberia allowed spring grain planting to progress without delay. Since early June, a brief episode of hot, dry weather in the southern Urals and Kazakhstan stressed spring grains in the early vegetative stage. Recently, cooler weather and scattered showers alleviated heat stress.

Import Estimate for 1990/91 Unchanged

Projected USSR grain imports for July-June 1990/91 remains at 36 million tons, unchanged from a month ago. However, the estimate of wheat versus coarse grain imports has been modified as prospects for a further strengthening in world corn prices relative to wheat are expected to result in even larger USSR feed quality wheat imports.

The estimate of wheat imports at 16 million tons is up 1 million from a month ago and would be the largest since 1987/88. Coarse grain imports are currently projected to fall to 19 million tons with corn imports expected to decline to 15 million, more than 3 million tons below the 1989/90 level. Rice, pulses and miscellaneous grains account for the balance.

A significant portion of the USSR's estimated 1990/91 wheat imports will be covered by agreements or trading arrangements. Virtually all the major exporters now have some sort of trading arrangement with the USSR covering wheat and or grain trade.

With corn expected to account for nearly 80 percent of the USSR's coarse grain imports in 1990/91, the U.S. should easily retain its position as the major supplier. Argentina and China have been the other suppliers with annual shipments ranging from 1 to 2 million tons in recent years. However, Argentine corn shipments to the USSR have declined recently, reflecting a combination of smaller crops and strong demand from other countries.

USSR grain buying activity has been relatively muted in recent weeks. The Soviet Union added modestly to purchases of U.S. wheat and corn for 1989/90 delivery and reportedly contracted for some new crop EC grain. Earlier shipment delays of French wheat to the USSR could mean that some of this grain may not move until 1990/91.

Normally the July-September quarter is a fairly light shipping period for the USSR as imports are minimized in order to lessen congestion in the transportation system as the domestic crop moves to market. In addition, exceptionally heavy USSR grain imports in the April-June quarter could further impact on grain import requirement over the next 3 months.

1989/90 Import Estimate Holds

Recent USSR wheat purchases have pushed total commitments for 1989/90 delivery to slightly over the import estimate of 14 million tons. However, delays in French wheat shipments could result in some sales currently on the books not moving until early in the 1990/91 marketing year.

USSR coarse grain purchases from all origins for 1989/90 delivery are currently estimated at slightly below the import estimate of 23 million. However, there continues to be uncertainty about the level of EC barley sales and whether Argentina has sold the USSR any new crop corn or grain sorghum.

Domestic Use to Continue Strong

Domestic grain utilization for 1990/91 is projected at a record 248 million tons, up slightly from the year-earlier level. Continued growth in livestock product output is expected to result in a further increase in the estimate of grain used for feed in 1990/91, particularly wheat. Wheat feeding in 1990/91 could be the highest in nearly a decade, reflecting a large domestic crop and sizable feed wheat imports. With total grain utilization expected to be somewhat less than supplies, grain stocks may increase modestly in 1990/91.

New U.S.-USSR Grain Agreement Signed

The new U.S.-USSR Grain Agreement was signed on June 6, 1990. Details of the new agreement were published in the May 1990 USSR Grain Situation and Outlook. A copy of the agreement can be obtained by contacting the following office:

Information Division
Room 5922-S
Foreign Agriculture Service
U.S. Dept. of Agriculture
Washington, DC 20250-1000

USSR Grain Area, Yield, and Production
1975-1989, and 1990 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production ^{1/} (Million) (Metric Tons)
<u>Wheat</u>			
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Preliminary)	47.5	1.91	90.5
1990 (Projected)	48.0	1.98	95.0
<u>Coarse Grains ^{2/}</u>			
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Preliminary)	55.9	1.91	107.0
1990 (Projected)	55.0	1.92	106.5
<u>Total Grain ^{3/}</u>			
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Preliminary)	112.0	1.88	211.1
1990 (Projected)	112.0	1.92	215.0

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

Year	Production	Trade (Jul/Jun)		Availability 1/ July/June		Total 1/ Seed		Industrial	Food	Dockage/ Waste 2/ Feed		Stock Change 3/ July/June
		Imports	Exports	July/June	Total Grains 4/ (Million Metric Tons)	Seed	Waste 2/ Feed					
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20	
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14	
1980/81	189.1	34.8	0.5	223	224	25	6	46	28	119	-1	
1981/82	158.2	47.3	0.5	205	211	25	5	47	16	118	-6	
1982/83	186.8	34.3	0.5	221	214	25	5	47	19	118	+7	
1983/84	192.2	32.5	0.5	224	218	26	5	47	21	120	+6	
1984/85	172.6	55.5	0.5	228	219	24	6	47	19	123	+9	
1985/86	191.7	29.9	0.5	221	220	24	5	47	18	126	+1	
1986/87	210.1	27.5	0.5	237	230	25	5	47	23	130	+7	
1987/88	211.4	32.0	0.5	243	239	25	5	47	30	132	+4	
1988/89	195.1	39.0	0.5	234	235	25	5	48	22	135	-1	
1989/90 5/ Projected 1990/91	211.1 215.0	38.0 36.0	0.5 1.0	249 250	246 248	25 25	5 5	48 48	29 29	139 141	+2 +2	
Wheat												
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18	
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12	
1980/81	98.2	16.0	0.5	114	113	13	2	35	15	48	+1	
1981/82	81.1	20.3	0.5	101	104	11	2	36	8	47	-3	
1982/83	84.3	20.8	0.5	105	101	11	2	36	9	43	+4	
1983/84	77.5	20.5	0.5	98	93	11	2	36	9	35	+4	
1984/85	68.6	28.1	0.5	96	91	11	2	36	8	35	+5	
1985/86	78.1	15.7	0.5	93	92	11	1	36	8	36	+1	
1986/87	92.3	16.0	0.5	108	103	11	1	36	10	45	+5	
1987/88	83.3	21.5	0.5	104	101	11	1	36	13	40	+3	
1988/89	84.4	15.5	0.5	99	100	11	1	37	10	41	-1	
1989/90 5/ Projected 1990/91	90.5 95.0	14.0 16.0	0.5 1.0	104 110	102 108	11 11	1 1	37 37	12 12	40 47	+2 +2	
Coarse Grains												
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2	
1979/80	81.2	18.4	—	100	102	12	4	7	10	68	-2	
1980/81	80.5	18.0	—	98	101	12	4	7	12	66	-2	
1981/82	69.3	26.0	—	95	98	13	3	7	7	68	-3	
1982/83	91.8	12.5	—	104	101	13	3	7	9	69	+3	
1983/84	101.9	11.5	—	113	112	13	3	7	11	78	+2	
1984/85	90.5	26.9	—	117	114	12	4	7	10	81	+4	
1985/86	100.0	13.7	—	114	114	12	4	7	9	82	—	
1986/87	105.9	11.0	—	117	115	13	4	7	11	80	+2	
1987/88	113.7	10.0	—	124	123	13	4	7	15	84	+1	
1988/89	97.5	23.0	—	121	121	13	4	7	11	86	—	
1989/90 5/ Projected 1990/91	107.0 106.5	23.0 19.0	— —	130 126	130 126	13 13	4 4	7 7	15 15	91 87	— —	

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports ^{1/}
By Country of Origin by Months
(1,000 Tons)

	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total ^{2/}
January 1987	---	383	153	642	75	1,253	
February	---	207	101	1,140	330	1,778	
March	316	497	134	1,165	303	2,415	
Jan-March	316	1,087	388	2,947	708	5,446	6,400
April	1,753	1,018	129	1,452	765	5,117	
May	1,840	777	123	1,050	412	4,202	
June	193	11	13	150	40	407	
April-June	3,786	1,806	265	2,652	1,217	9,726	12,400
July	1,915	---	---	59	10	1,984	
August	1,064	---	---	---	---	1,089	
September	316	74	---	---	---	415	
July-September	3,295	74	---	59	10	3,488	4,600
October	---	872	---	540	---	1,422	
November	525	357	---	708	---	1,607	
December	1,703	332	---	435	---	2,485	
October-December	2,228	1,561	---	1,683	---	5,514	6,500
January 1988	1,852	72	---	647	---	2,571	
February	1,746	93	---	764	135	2,738	
March	2,255	101	---	924	486	3,766	
Jan-March	5,853	366	---	2,335	621	9,075	10,000
April	2,406	713	---	275	332	3,726	
May	1,995	1,123	---	180	6	3,304	
June	755	898	---	235	---	1,888	
April-June	5,156	2,734	---	690	338	8,918	10,400
July	375	131	---	53	35	594	
August	804	---	---	15	175	994	
September	344	126	---	1	4	475	
July-September	1,523	257	---	69	214	2,063	2,600
October	1,935	524	---	480	264	3,203	
November	1,529	341	15	1,011	114	3,010	
December	1,585	261	---	1,422	47	3,315	
October-December	5,049	1,126	15	2,913	425	9,528	10,800
January 1989	2,234	316	---	633	43	3,226	
February	2,631	172	---	861	23	3,687	
March	3,115	81	---	954	202	4,352	
Jan-March	7,980	569	---	2,448	268	11,265	12,100
April	2,105	371	80	1,500 ^{3/}	182	4,238	
May	3,061	351	104	650 ^{3/}	221	4,387	
June	2,752	60	66	450 ^{3/}	66	3,394	
April-June	7,918	782	250	2,600 ^{3/}	469	12,019	13,500
July	1,408	49	---	206	---	1,663	
August	389	---	---	26	---	415	
September	---	---	---	37	---	37	
July-September	1,797	49	---	269	---	2,115	2,800
October	805	---	---	105 ^{3/}	---	910	
November	3,497	397	---	460 ^{3/}	---	4,354	
December	3,145	302	---	350 ^{3/}	---	3,797	
October-December	7,447	699	---	915 ^{3/}	---	9,061	10,000
January 1990	2,314	519	---	900 ^{3/}	65 ^{3/}	3,798	
February	1,786	347	---	1,200 ^{3/}	175 ^{3/}	3,508	
March	1,838	448	---	1,000 ^{3/}	225 ^{3/}	3,511	
Jan-March	5,938	1,314	---	3,100 ^{3/}	465 ^{3/}	10,817	12,000

^{1/} Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

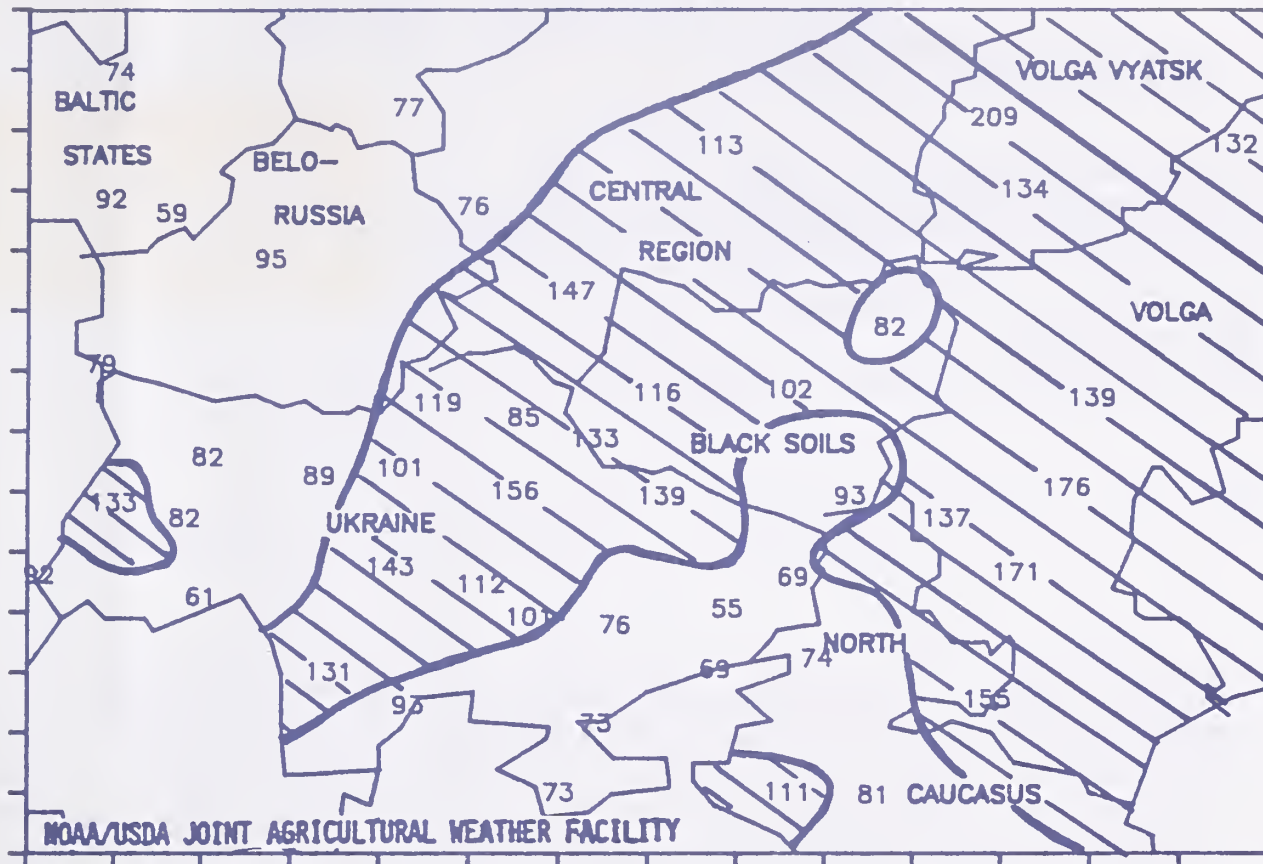
^{2/} Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

^{3/} Preliminary

N/A Not Available

WESTERN USSR: MARCH – MAY, 1990

PERCENT OF NORMAL PRECIPITATION



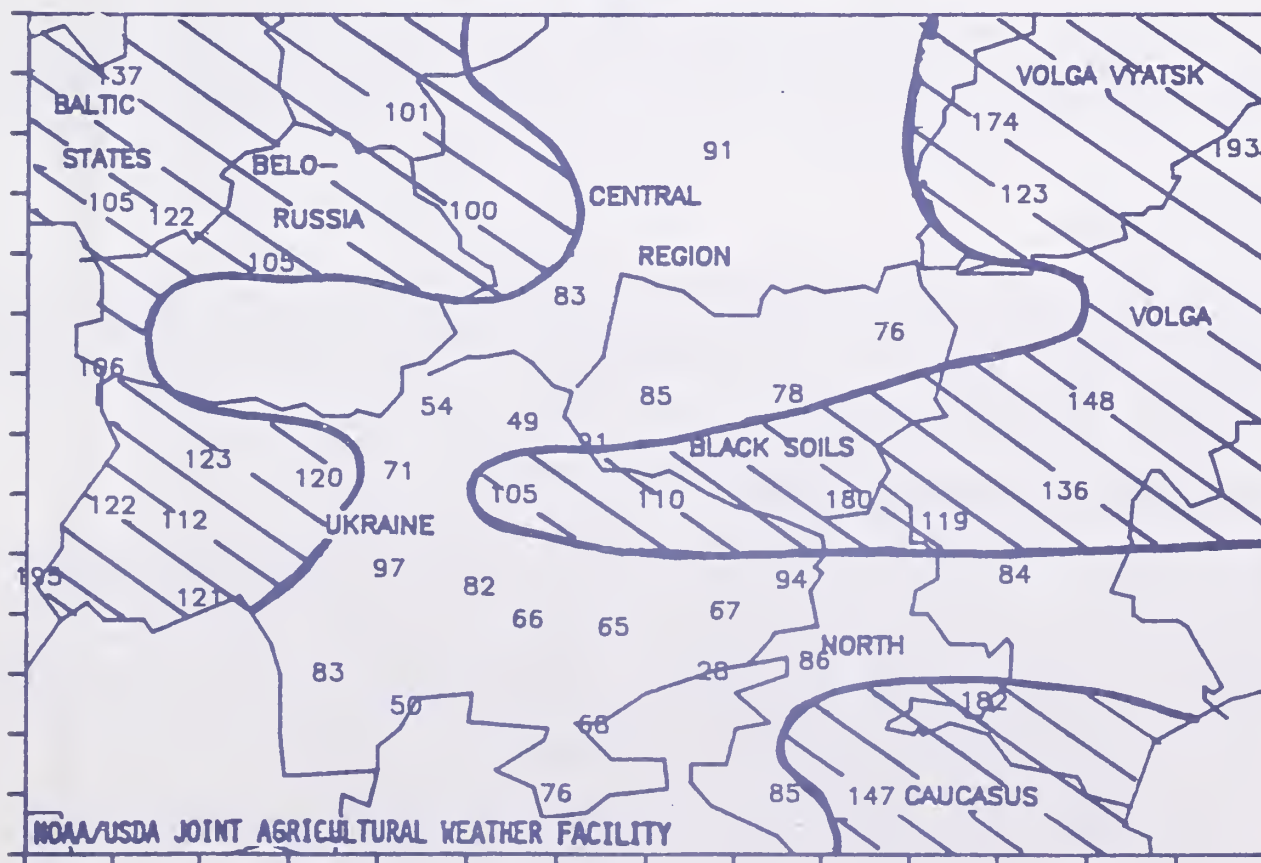
ABOVE NORMAL



BELOW NORMAL

WESTERN USSR: MARCH – MAY, 1989

PERCENT OF NORMAL PRECIPITATION



UNITED STATES DEPARTMENT OF AGRICULTURE

Foreign Agricultural Service
Room 4644-S
WASHINGTON, D.C. 20250-1000

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, \$300

FIRST-CLASS MAIL
POSTAGE & FEES PAID
USDA-FAS
WASHINGTON, D.C.
PERMIT No. G-262

If your address should be changed _____ PRINT
OR TYPE the new address, including ZIP CODE and
return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 4644 So.
U.S. Department of Agriculture
Washington, D. C. 20250.

BELTSVILLE MD 20705
2121 K STREET, N.W.
NATIONAL AGR LIBRARY, RM. 002
SARAH THOMAS / SOVIET EXCHANGE
1-1873 12114/20705ST/NA 1 0001

= = = = =
= The summary of this report and other statistical, economic, marketing, and =
= news reports are available within minutes of their release through USDA's =
= EDI SERVICE. For more information, call or write Russell Forte, Office of =
= Governmental and Public Affairs, USDA, Room 536-A, Administration Building, =
= Washington, D.C. 20250, tel. (202) 447-5505. =
= = = =

HOW TO SUBSCRIBE

"USSR Grain Situation and Outlook" circulars are issued 8 times per year. They are available on a subscription basis for \$12 in the United States or \$18 for foreign addresses.

To subscribe, send your check, payable to the Foreign Agricultural Service, to: Information Division, FAS, USDA, Room 4644-South Building, Washington, D.C. 20250-1000. Only checks drawn on U.S. banks, cashier's checks, or international money orders will be accepted. NO REFUNDS CAN BE MADE.

HOW TO RENEW

You will receive notification about 60 days before your annual subscription expires. To prevent a lapse in service, promptly return your renewal form and payment. **Inquiries:** If you have a question about your subscription, write to the above address or call (202) 382-9445.

HOW TO OBTAIN DATABASE TAPES

Agricultural production, supply and distribution database tapes are available on a one-time or subscription basis from the National Technical Information Service of the U.S. Department of Commerce. The tapes are updated quarterly and contain data for many commodities and countries from 1960 to the present. Each tape costs \$203 for domestic and \$404 for foreign orders, including airmail, handling and shipping charges. Use order number PB 88-149570 and specify the recording density desired. Write to NTIS, 5285 Port Royal Road, Springfield, Virginia 22161, or call (703) 487-4650 to obtain the most current tape or (703) 487-4763 for a subscription.



United States
Department of
Agriculture

Foreign
Agricultural
Service

Circular Series

SG 2-90
May 1990

USSR Grain Situation and Outlook

The highlights of this first review of the 1990/91 USSR grain situation and outlook include:

- Prospects for a large 1990 grain crop as weather has been favorable and yields could well be record high.
- Expectations that grain utilization will continue to expand as the USSR strives to meet growing demand for livestock products.
- Continued heavy grain imports.
- With a narrowing wheat/corn price spread and ample exportable supplies of lower quality wheat in some countries, USSR feed wheat imports are expected to increase.
- Increasing USSR dependence on grain agreements to cover import needs.

USSR GRAIN CROP TO INCREASE

The first USDA forecast of the 1990 USSR grain crop is 215 million tons, up nearly 4 million tons from the 1989 crop. This includes 95 million tons of wheat, 106.5 million coarse grains, and 13.5 million miscellaneous grains and pulses. Total 1990 grain area is estimated at 112 million hectares, similar to last year's estimated area. Total grain yields are forecast at record levels. Final 1989 official grain figures by type have not yet been published. Except for total grain production and yield, all other figures for 1989 are USDA estimates.

WINTERKILL REPORTED BELOW AVERAGE IN 1989/90

According to Pravda (23 April), winter grains were in above-average condition this year. It was indicated that about 6 million hectares had been reseeded in previous years. Only about 3.5 million hectares of winter grains are expected to be resown with spring grains in 1990. This implies winterkill of around 9-10 percent. Winterkill has averaged 16-20 percent in the last several years, although it was below average in 1988 and 1989.

SPRING SEEDING PROGRESS SIMILAR TO LAST YEAR'S RAPID START

As of April 16, spring grains (excluding corn) on state and collective farms had been seeded on 12 million hectares, similar to last year's early seeding start. Area seeded on this date in 1985-88 averaged under 8 million hectares.

WEATHER AND CROP DEVELOPMENTS

In the European USSR, timely planting along with adequate moisture last fall favored emergence and establishment of the 1990 winter grain crop. The second consecutive milder-than-normal winter provided mostly favorable overwintering conditions for winter grains. However, Soviet press expressed some concern about the potential adverse affects of a mid-January freeze and ice crusting in the southern portion of the Central Region, the Black Soils Region, and the middle Volga Valley, as well as snow smothering in some northeast winter rye areas. Moisture accumulations during the winter were near to above-normal over most areas except for Moldavia and the southern Ukraine where precipitation was well below normal.

In April, the weather continued unusually mild, accelerating winter grains growth and development. By the end of the month, winter grains had advanced to the jointing stage as far north as the southern portion of the Central Region, about 3 weeks earlier than usual. On April 10, a brief cold snap over Moldavia and the western Ukraine dropped minimum temperatures to as low as -4 degrees (C). Temperatures were not low enough to significantly damage winter grains in the early jointing stage. Above-normal precipitation over the northern Ukraine, the Black Soils Region, the Volga Vyatsk, Volga, and the northern North Caucasus benefited winter grains. Although below-normal precipitation covered the Baltic States and Belorussia, it helped spring grain planting. Near-normal precipitation in Moldavia and the southern Ukraine reversed persistent dryness, improving moisture conditions for crops.

Since early May, soaking rain covered the North Caucasus and the lower Volga, benefiting winter grains nearing the heading stage. Generally dry weather over the northern half of European USSR allowed spring grain planting.

In spring grain areas east of the Urals, planting usually begins around mid-May. Above-normal winter precipitation provided abundant subsoil moisture. Although precipitation in April was mostly below normal, recent showers increased topsoil moisture for planting.

IMPORTS TO CONTINUE LARGE

USSR grain imports for July-June 1990/91 are projected at 36 million tons, only slightly below the level of the 2 preceding years. The Soviet Union's dependence on imported grain is expected to continue heavy in 1990/91 despite prospects of a slightly larger crop and the announcement of programs which are intended to increase state grain procurements. The most recent announcement sharply increases the ruble price that the state will pay farms for certain grain sold in 1990. This follows the program introduced in late 1989 to pay farms in convertible rubles for delivery of above average quantities of quality wheat. Due to the lateness of the announcement and problems with implementation, this program only resulted in the sale of about 250,000 tons of grain to the state.

USSR wheat imports, projected at 15 million tons in 1990/91, are likely to include sizeable quantities of feed quality wheat. An expected narrowing of the price spread between lower quality wheats and corn is likely to result in an increase in USSR feed quality wheat purchases, particularly from the EC. In

the past the USSR has also purchased a significant quantity of feed grade wheat from Canada particularly from the weather damaged 1986 crop.

USSR coarse grain imports for 1990/91 are currently projected at 20 million tons, down modestly from the level of the 2 preceding years. Despite prospects for another good coarse grain crop, strong demand from the livestock sector is expected to result in another year of large USSR corn purchases. The U.S. will again be the major supplier as competitor supplies are expected to be limited.

The availability of financing is likely to be an important consideration in how much and from whom the Soviets purchase grain in 1990/91. The Soviets apparently has taken a number of actions in recent weeks in an attempt to alleviate certain concerns about delayed payments and credit needs. However, with Soviet import demand for both agriculture and manufactured goods expected to continue high in 1990/91, Soviet credit needs will likely continue heavy.

DOMESTIC USE TO INCREASE MODESTLY

USSR domestic use of grain is expected to reach a record 248 million tons in 1990/91. Actual utilization of grain including seed, industrial use, food, and feed is projected at a new high of 219 million tons. The allowance for dockage and waste has been set at 29 million tons, or 13 percent of the projected crop. Efforts by the USSR to reduce the loss and waste of grain in transit and storage may be negated in part by the recent trend to hold more grain back on the farm. As farm storage in some cases may be inadequate, there is a risk that substantial quantities of grain held at the farm level may be lost. With total grain utilization forecast to be somewhat less than 1990/91 supplies (production plus imports), grain stocks may increase modestly in 1990/91.

FERTILIZER PRODUCTION DOWN

USSR output of mineral fertilizers in the first quarter of 1990 totaled 8.5 million tons, down 7 percent from the same time last year. Moreover, deliveries of mineral fertilizers and liming materials to farms were both down 12 percent in the first quarter.

LIVESTOCK PRODUCT OUTPUT DECLINES

Compared to last year, total cattle inventories on state and collective farms as of April 1 decreased by about 2 percent, down to 93.3 million head. Cow and hog numbers both fell 1 percent, to 28.1 million and 57.9 million head, respectively. Sheep and goat inventories were down 5 percent.

Total meat output on state and collective farms in the first quarter fell by 3 percent to 5.5 million tons, and output of eggs was down 4 percent. However, milk yields increased by 4 percent, with milk output at 18.2 million tons, up 3 percent from the first 3 months of 1989.

U.S. INCREASES LTA CONSULTATION TRIGGER LEVEL

The purchase level which may trigger consultations under the extended U.S.-USSR Grain Agreement (LTA) has been increased to 22 million tons for the 1989/90 agreement year. The allowable limit previously had been raised from a base of

12 million tons; it was increased from 12 million to 16 million tons in October 1989 and from 16 million to 20 million tons in December 1989. The adjustment means that USSR purchases of U.S. wheat and corn, for shipment during the 12-month period which began October 1, 1989, can now proceed up to a total level of 22 million tons without further consultations or communications under the agreement. The increase in the consultation level for this year's trade results from contact between the two sides over recent days, and takes into account recent increases in USSR purchases of U.S. corn. It also takes into account the fact that Soviet Union purchases of U.S. wheat and corn thus far for shipment during the current agreement year already total over 18.9 million tons, with a number of months still remaining in the agreement year.

1989/90 UPDATE

Since the last USSR Grain Situation and Outlook was released in February 1990, USSR grain purchases for delivery in the 1989/90 marketing year have increased dramatically. Reflecting the recent surge in purchases of U.S. corn, total coarse grain purchases from all origins for delivery in 1989/90 are estimated at over 22 million tons, compared with estimated imports of 23 million. The U.S. accounts for around 75 percent of USSR's coarse grain purchases as Soviet grain buyers continue their heavy dependence on U.S. corn. Recent wheat purchases are believed to have about covered the Soviet's estimated 1989/90 wheat import requirements of 14 million tons.

The estimate of dockage/waste for 1989/90 has been increased. In 1989, state and collective farms retained unusually large amounts of grain for their own use. Those farms lack necessary drying and storage facilities and above average losses of grain are believed to have occurred. This assumption is supported by statements in the Soviet press about inadequate feed availability, and the disappointing performance of the livestock sector in the first quarter of 1990. The increase in the estimate of dockage/waste is balanced by a 3-million ton decline in the grain for feed estimate to 139 million tons.

U.S.-USSR AGREE TO A NEW GRAIN AGREEMENT IN PRINCIPLE

The following table presents some of the major features of the new U.S.-USSR grain agreement. The agreement is expected to be formally signed later this year.

U.S.--USSR Long-Term Agreement 1/

Item	New LTA	Old LTA
Duration	5 years	5 years
Annual minimum purchase level	4 MMT wheat 4 MMT coarse grains <u>2/</u> 2 MMT either wheat, coarse grains, soybeans or soybean meal <u>3/</u>	4 MMT wheat 4 MMT corn 1 MMT either wheat, corn, soybean, or meal <u>3/</u>
5 year minimum purchase levels	20 MMT wheat 20 MMT coarse grains 10 MMT either wheat, coarse grains, soybeans or meal <u>3/</u>	Not applicable
Flexibility	In any one year USSR can substitute up to 750,000 tons of one grain for other but at no time during this agreement can the total of wheat or coarse grains purchased on account of the other exceed 1.5 MMT.	Not applicable
Maximum purchase without consultation	14 MMT wheat and coarse grains	12 MMT wheat and corn
Pricing	"Competitive prices"	"Prevailing market price"

1/ Agreement not yet signed; details based on press release and subsequent press conference.

2/ Coarse grains include corn, sorghum and barley.

3/ One ton of soybeans or meal counts as 2 tons of grain toward minimum.

USSR Grain Area, Yield, and Production
1975-1989, and 1990 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production ^{1/} (Million) (Metric Tons)
<u>Wheat</u>			
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Preliminary)	47.5	1.91	90.5
1990 (Projected)	48.0	1.98	95.0
<u>Coarse Grains ^{2/}</u>			
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Preliminary)	55.9	1.91	107.0
1990 (Projected)	55.0	1.92	106.5
<u>Total Grain ^{3/}</u>			
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Preliminary)	112.0	1.88	211.1
1990 (Projected)	112.0	1.92	215.0

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

Year	Production	Trade (Jul/Jun)		Availability 1/		Total 1/		Industrial	Food	Dockage/		Feed	Stock Change 3/ July/June
		Imports	Exports	July/June	(Million Metric Tons)	Seed	Waste 2/						
1978/79	237.4	15.6	2.8	250	Total Grains 4/ 230	25	28	6	46			125	+20
1979/80	179.2	31.0	0.8	209	223	26	22	6	46			123	-14
1980/81	189.1	34.8	0.5	223	224	25	28	6	46			119	-1
1981/82	158.2	47.3	0.5	205	211	25	16	5	47			118	-6
1982/83	186.8	34.3	0.5	221	214	25	19	5	47			118	+7
1983/84	192.2	32.5	0.5	224	218	26	21	5	47			120	+6
1984/85	172.6	55.5	0.5	228	219	24	19	6	47			123	+9
1985/86	191.7	29.9	0.5	221	220	24	18	5	47			126	+1
1986/87	210.1	27.5	0.5	237	230	25	23	5	47			130	+7
1987/88	211.4	32.0	0.5	243	239	25	30	5	47			132	+4
1988/89	195.1	39.0	0.5	234	235	25	22	5	48			135	-1
1989/90 5/	211.1	38.0	0.5	249	246	25	29	5	48			139	+2
Projected 1990/91	215.0	36.0	1.0	250	248	25	29	5	48			142	+2
<u>Wheat</u>													
1978/79	120.9	5.1	1.5	124	107	13	14	2	35			43	+18
1979/80	90.2	12.0	0.5	102	114	13	11	2	35			53	-12
1980/81	98.2	16.0	0.5	114	113	13	15	2	35			48	+1
1981/82	81.1	20.3	0.5	101	104	11	8	2	36			47	-3
1982/83	84.3	20.8	0.5	105	101	11	9	2	36			43	+4
1983/84	77.5	20.5	0.5	98	93	11	9	2	36			35	+4
1984/85	68.6	28.1	0.5	96	91	11	8	2	36			35	+5
1985/86	78.1	15.7	0.5	93	92	11	8	1	36			36	+1
1986/87	92.3	16.0	0.5	108	103	11	10	1	36			45	+5
1987/88	83.3	21.5	0.5	104	101	11	13	1	36			40	+3
1988/89	84.4	15.5	0.5	99	100	11	10	1	37			41	-1
1989/90 5/	90.5	14.0	0.5	104	102	11	12	1	37			40	+2
Projected 1990/91	95.0	15.0	1.0	109	107	11	12	1	37			46	+2
<u>Coarse Grains</u>													
1978/79	105.4	10.0	1.0	114	112	10	13	4	7			79	+2
1979/80	81.2	18.4	—	100	102	12	10	4	7			68	-2
1980/81	80.5	18.0	—	98	101	12	12	4	7			66	-2
1981/82	69.3	26.0	—	95	98	13	7	3	7			68	-3
1982/83	91.8	12.5	—	104	101	13	9	3	7			69	+3
1983/84	101.9	11.5	—	113	112	13	11	3	7			78	+2
1984/85	90.5	26.9	—	117	114	12	10	4	7			81	+4
1985/86	100.0	13.7	—	114	114	12	9	4	7			82	—
1986/87	105.9	11.0	—	117	115	13	11	4	7			80	+2
1987/88	113.7	10.0	—	124	123	13	15	4	7			84	+1
1988/89	97.5	23.0	—	121	121	13	11	4	7			86	—
1989/90 5/	107.0	23.0	—	130	130	13	15	4	7			91	—
Projected 1990/91	106.5	20.0	—	136	126	13	15	4	7			88	—

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

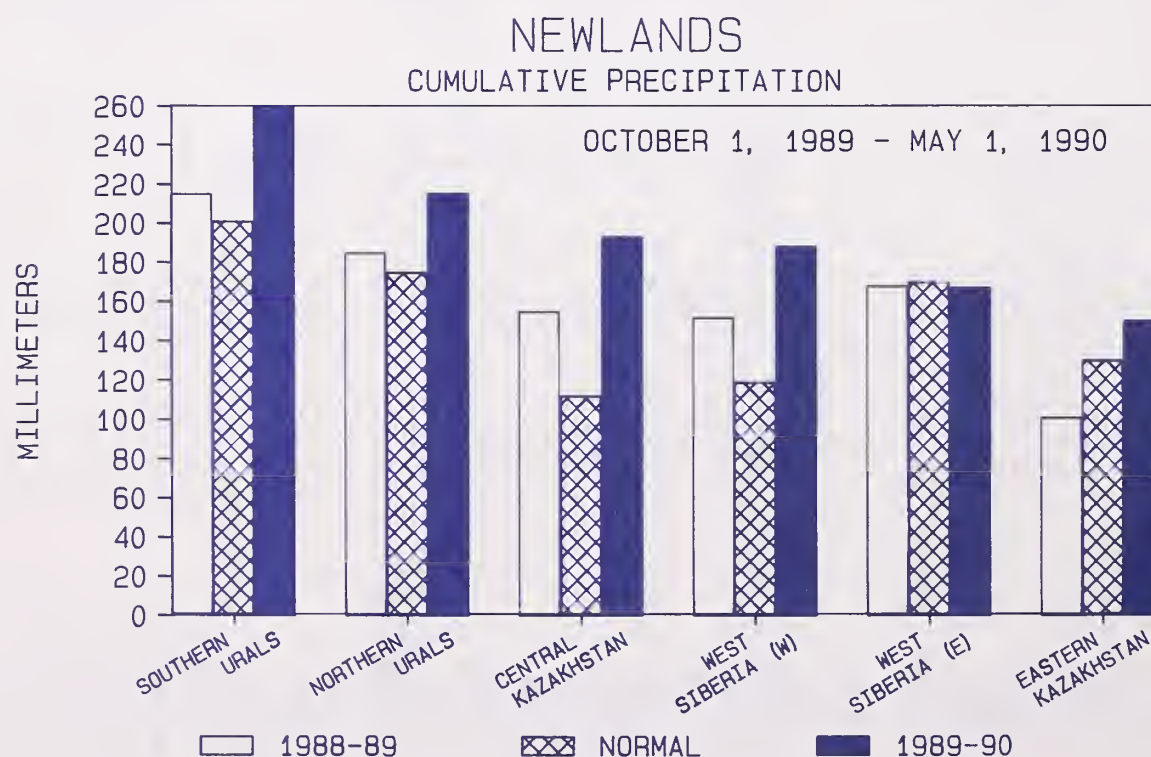
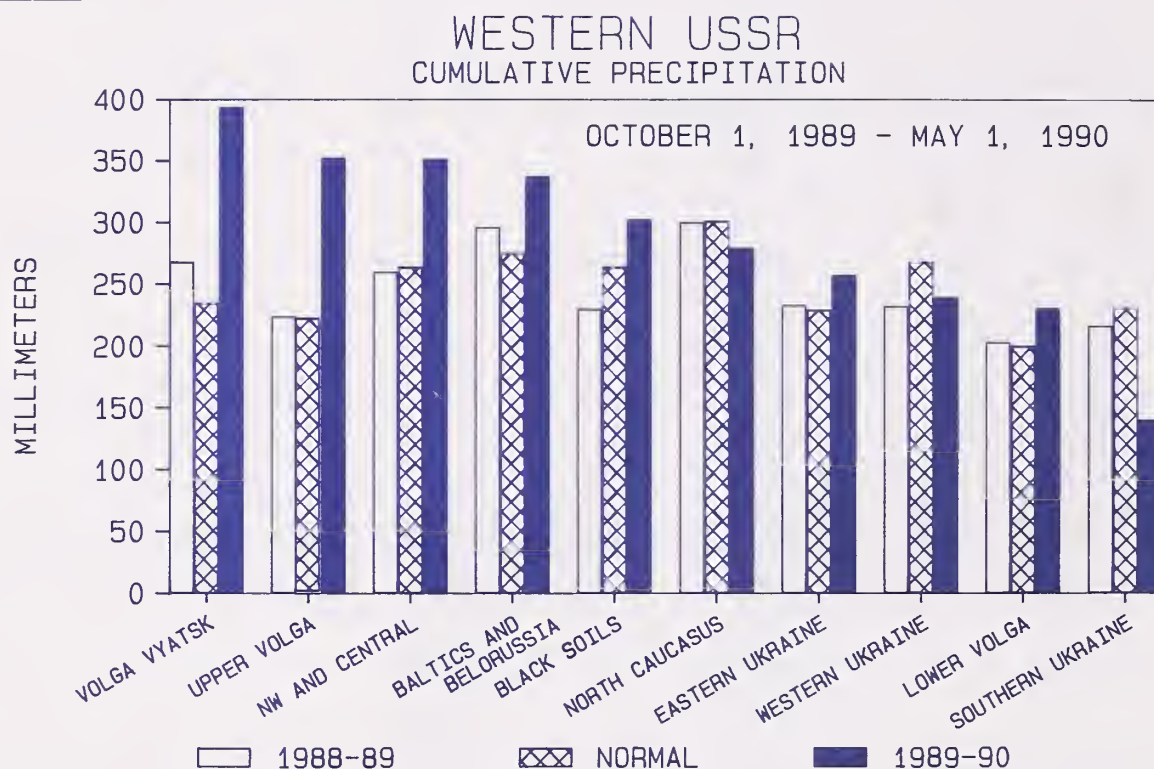
5/ Preliminary for trade, availability, utilization, and stocks change.

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, \$300

FIRST-CLASS MAIL
POSTAGE & FEES PAID
USDA-FAS
WASHINGTON, D.C.
PERMIT No. G-262

If your address should be changed _____ PRINT
OR TYPE the new address, including ZIP CODE and
return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 4644 So.
U.S. Department of Agriculture
Washington, D.C. 20250





United States
Department of
Agriculture

Foreign
Agricultural
Service

USSR Grain Situation and Outlook

Circular Series

SG 1-90

February 1990

The Soviet Union's 1989 plan fulfillment report released in late January, reported a bunkerweight grain crop of 211.1 million tons and a record average yield of 1.88 tons per hectare (the previous record all-grain yield was 1.85 tons in 1978). This results in a calculated area of approximately 112 million hectares, down nearly 3 million from 1988 and the lowest since at least 1955. The January 1990 USDA estimate was 208 million tons of grain with an area of 111.5 million hectares. Since no individual statistics were released on any of the major grains; area, yield and production by type of grain remains USDA estimates. Further adjustments by grain type will be made as more detailed official Soviet data is released.

WEATHER AND CROP DEVELOPMENTS

Winter grains got off to a good start last fall with adequate moisture in most areas. The growing conditions last fall were conducive to good establishment and satisfactory plant hardening prior to the onset of winter. January's above-normal precipitation increased moisture reserves in the Baltic States, Belorussia, Central Region, Volga Vyatsk, western Black Soils Region, the eastern Ukraine, and parts of the North Caucasus. In contrast, there was below-normal precipitation in the western and southern Ukraine, the eastern Black Soils Region, and the Volga. Unusually mild weather covered the European USSR during most of January. Monthly average temperatures were 2-4 degrees C above-normal in the east and south, and 4-6 degrees C above-normal in the west. A brief cold spell during January 13-15 in the Central Region, the Black Soils Region, the Volga, and the Volga Vyatsk Region, produced the coldest weather so far this winter (nighttime lows ranged from -20 to -33 degrees C). While overall, damage to winter grain was probably minimal, some localized damage may have occurred in areas where snow cover was uneven. Although January's unseasonably warm weather provided generally favorable conditions for winter grains, it left crop areas in the Baltic States, Belorussia, the Ukraine and the western North Caucasus without a protective snow cover and caused winter grains to lose hardiness, making them more susceptible to potential winterkill. Since early February, unseasonably warm weather continued over most of the European USSR, causing continued melting of snow. Some reports have indicated greening of winter grains in Moldavia, the Crimea, and the western North Caucasus, while crops over the remainder of the region remain dormant.

USSR GRAIN IMPORTS INCREASED

In recent weeks USSR grain purchases, particularly wheat, have increased sharply. Roughly 5 million tons of wheat were purchased from the U.S., EC, and Argentina. USSR purchases from all origins have now risen to over 12 million tons and since almost all of these purchases call shipment by the end of March there appears to be a possibility of further purchases for April-June shipment. Thus, the USSR wheat import estimate has been increased by 2 million tons to 14 million.

Competition between major exporting countries, especially the U.S. and EC, could be intense as the Soviets move to cover the balance of their anticipated import needs for 1989/90. Despite recent sale successes, the EC still is faced with the prospect of some addition to wheat stocks in 1989/90. With prospects likely for another large EC wheat crop in 1990, holders of this wheat will likely lobby the Commission for a more aggressive export program. In addition, Canada and Australia could accelerate export sales in the coming months in anticipation of a large Northern Hemisphere crop and lower wheat prices in the 1990/91 marketing year.

Even with special incentives to producers to encourage deliveries of quality wheats to the State, procurements have shown little improvement from a year ago. It appears that producers have kept substantially more of the wheat crop than usual on farm, possibly for feed or in stocks while awaiting more attractive incentives to sell.

Since last fall's flurry, the pace of USSR coarse grain purchases has slowed. Through early February, total purchases were close to 17 million tons, with U.S. sales accounting for around 70 percent of the total. Corn continues to be the major coarse grain imported, accounting for around 70 percent of the total to date. Reflecting large EC sales, barley imports are expected to total close to 4 million tons, the largest since 1984/85. The recent tightening of world sorghum supplies and narrowing of the price spread between corn and sorghum has been reflected in a reduction in the estimate of USSR sorghum imports for 1989/90. This combined with declining corn export prospects in Argentina and China has resulted in modest reduction in the estimate of 1989/90 USSR coarse grain imports to 23 million tons.

DOMESTIC USE ESTIMATE INCREASES

The estimate of domestic use has been increased by 3 million tons to a record 246 million tons. The combination of large coarse grain supplies and smaller than expected deliveries of wheat to the State is likely to increase the quantity of grain available for feed use. Consequently, the estimate of grain used for feed has been increased to a record 142 million tons. The allowance for dockage and waste was also increased to reflect the modest upward adjustment in the crop.

SOVIET UNION INVITED TO BUY MORE GRAIN

Since the last USSR circular was released in November, 1989, the United States has raised the purchase level which would trigger consultations under the extended U.S. - USSR Grain Agreement from 16 million tons to 20 million tons for 1989/90. Under the LTA, USSR purchases of U.S. wheat and corn can now increase to 20 million tons without further consultations.

USDA EXTENDS ADDITIONAL EEP FOR WHEAT

As a result of the earlier U.S. offer of the opportunity to purchase 2 million tons of wheat under the Export Enhancement Program (EEP), total U.S. wheat sales to the USSR during the 1989/90 agreement year have risen to nearly 2.8 million tons. Recent purchases have virtually exhausted the 2 million ton EEP offer. Under the LTA, the USSR is obligated to buy a minimum of 4 million tons of U.S. wheat during the October - September 1989/90 period.

GRAIN SHIPPING PACE PICKS UP

Based on data from the major exporters, grain shipments to the USSR during the October-December 1989 quarter totaled around 10 million tons, about on par with the average for this quarter in recent years. However, apparent internal transportation and handling problems have limited the flow of grain away from the port areas resulting in a significant increase in the time needed to berth and unload arriving grain vessels. This problem could continue during the January-March quarter as wheat shipments from the major exporters are expected to increase sharply, more than offsetting an expected slowdown in coarse grain shipments.

WHEAT PROCUREMENTS AS SHARE OF CROP CONTINUE DECLINE

State procurements of wheat in 1989 are estimated at about 34-35 million tons, about the same as in 1988, when output was an estimated 6 million tons less. Moreover, 1989 procurements of "quality" wheat are likely to be below the 1988 level, in spite of efforts by the State to raise procurements by offering convertible rubles in exchange for quality wheat sales. Reportedly, Soviet farms sold the State only 223,000 tons of wheat for convertible rubles, well below the program target which called for over 10 million tons in additional sales.

USSR: State Procurements of Wheat

	Wheat Production	<u>Wheat Procurements</u>		
		Total	of which Durum	of which Silnaya 1/
		(million tons)		
1982	84.30	36.70	0.90	5.32
1983	77.50	34.10	1.30	3.78
1984	68.60	25.50	0.28	3.72
1985	78.10	35.10	1.23	6.87
1986	92.30	43.80	2.55	10.99
1987	83.30	35.20	1.02	7.22
1988	84.40	34.80	0.74	6.17
1989 2/	89.00	34.35	NA	NA

1/ High Quality Hard Wheat

2/ USDA Estimate

USSR RELEASES GRAIN PRODUCTION DATA IN CLEAN WEIGHT:

For the first time ever, the Soviets reported total grain output not only in bunkerweight but in weight after cleaning and drying at procurement sites. The Soviet data indicates that grain dockage and waste during the 1980's has been running at about 7 percent of bunkerweight output. However, unlike USDA estimates of dockage and waste, the newly released Soviet figures do not include waste of grain in storage and transportation both before and after drying and cleaning up to milling.

USSR: Grain Output

	Bunker weight	Wgt after processing at procurement site 1/ million tons	Percent change %
1981-85	180.3	168.8	6.38
1986-89	206.9	191.1	7.64
1988	195.0	180.2	7.59
1989	211.1	196.4	6.96
1981-89 avg.			7.14

1/ Soviet category does not account for grain losses after drying and cleaning.

YEAR ENDING LIVESTOCK INVENTORIES DOWN FOR THIRD YEAR

Soviet cattle inventories as of 1 January, 1990 declined for the third consecutive year, to the lowest level since 1983. Inventories of cows fell for the sixth successive year, to the lowest level in 14 years. Sheep and goat numbers decreased by 2 percent from January 1, 1989, and are now at their lowest level since 1972. Increased hog inventories in 1990 provided the only bright spot for the sector. Little change is expected in poultry numbers.

USSR: Livestock Inventories, January 1

	1986	1987	1988	1989	1990
	million head				
Cattle	120.9	122.1	120.6	119.6	118.3
Cows	42.9	42.4	42.0	41.8	41.7
Hogs	77.8	79.5	77.4	78.1	78.9
Sheep & Goats	147.3	148.7	147.3	147.5	144.5
Poultry	1,166.0	1,174.0	1,175.0	1,200.00	NA

USSR Grain Area, Yield, and Production
1975-1988, and 1989 (Projected)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production ^{1/} (Million) (Metric Tons)
<u>Wheat</u>			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987	46.7	1.78	83.3
1988	48.1	1.76	84.4
1989 (Projected)	47.5	1.91	90.5
<u>Coarse Grains ^{2/}</u>			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987	59.5	1.91	113.7
1988	57.8	1.69	97.5
1989 (Projected)	55.9	1.91	107.0
<u>Total Grain ^{3/}</u>			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987	115.2	1.83	211.4
1988	114.9	1.70	195.1
1989 (Projected)	112.0	1.88	211.1

^{1/} "Bunker weight" basis; not discounted for excess moisture or foreign material.

^{2/} Includes rye, barley, oats, corn, sorghum, and millet.

^{3/} Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

Year	Production	Trade (Jul/Jun)	Availability 1/ July/June	Total 1/ Seed (Million Metric Tons)	Industrial	Food	Dockage/ Waste 2/ Feed	Stock Change 3/ July/June
		Imports	Exports					
1975/76	140.1	26.1	0.7	166	5	45	14	-12
1976/77	223.8	11.0	3.3	232	5	45	31	+12
1977/78	195.7	18.9	2.3	212	5	45	29	-16
1978/79	237.4	15.6	2.8	250	6	46	28	+20
1979/80	179.2	31.0	0.8	209	6	46	22	-14
1980/81	189.1	34.8	0.5	223	6	46	28	-1
1981/82	158.2	47.3	0.5	205	5	47	16	-6
1982/83	186.8	34.3	0.5	221	5	47	19	+7
1983/84	192.2	32.5	0.5	224	5	47	21	+6
1984/85	172.6	55.5	0.5	228	6	47	19	+9
1985/86	191.7	29.9	0.5	221	5	47	18	+1
1986/87	210.1	27.5	0.5	237	5	47	23	+7
1987/88	211.4	32.0	0.5	243	5	47	30	+4
1988/89 5/	195.1	39.0	0.5	234	5	48	22	-1
Projected 1989/90	211.1	38.0	1.0	248	5	48	26	+2
Total Grains 4/								
				178				
1975/76	66.2	10.1	0.5	76	1	35	7	-10
1976/77	96.9	4.6	1.0	100	2	35	14	+8
1977/78	92.2	6.6	1.0	98	2	35	14	-11
1978/79	120.9	5.1	1.5	124	2	35	14	+18
1979/80	90.2	12.0	0.5	102	2	35	11	-12
1980/81	98.2	16.0	0.5	114	2	35	15	+1
1981/82	81.1	20.3	0.5	101	2	36	8	-3
1982/83	84.3	20.8	0.5	105	2	36	9	+4
1983/84	77.5	20.5	0.5	98	2	36	9	+4
1984/85	68.6	28.1	0.5	96	2	36	8	+5
1985/86	78.1	15.7	0.5	93	1	36	8	+1
1986/87	92.3	16.0	0.5	108	1	36	10	+5
1987/88	83.3	21.5	0.5	104	1	36	13	+3
1988/89 5/	84.4	15.5	.5	99	1	37	10	-1
Projected 1989/90	90.5	14.0	1.0	104	1	37	11	+2
Coarse Grains								
				83				
1975/76	65.8	15.6	—	81	4	7	6	-2
1976/77	115.0	5.7	2.0	119	3	7	16	+4
1977/78	92.6	11.7	1.0	103	3	7	14	-5
1978/79	105.4	10.0	1.0	114	4	7	13	+2
1979/80	81.2	18.4	—	100	4	7	10	-2
1980/81	80.5	18.0	—	98	4	7	12	-2
1981/82	69.3	26.0	—	95	3	7	7	-3
1982/83	91.8	12.5	—	104	3	7	9	+3
1983/84	101.9	11.5	—	113	3	7	11	+2
1984/85	90.5	26.9	—	117	4	7	10	+4
1985/86	100.0	13.7	—	114	4	7	9	—
1986/87	105.9	11.0	—	117	4	7	11	+2
1987/88	113.7	10.0	—	124	4	7	15	+1
1988/89 5/	97.5	23.0	—	121	4	7	11	—
Projected 1989/90	107.0	23.0	—	130	4	7	13	—

1/ Availability excludes beginning stocks. Totals may not add due to rounding.

2/ Includes post harvest losses incurred in transport and storage.

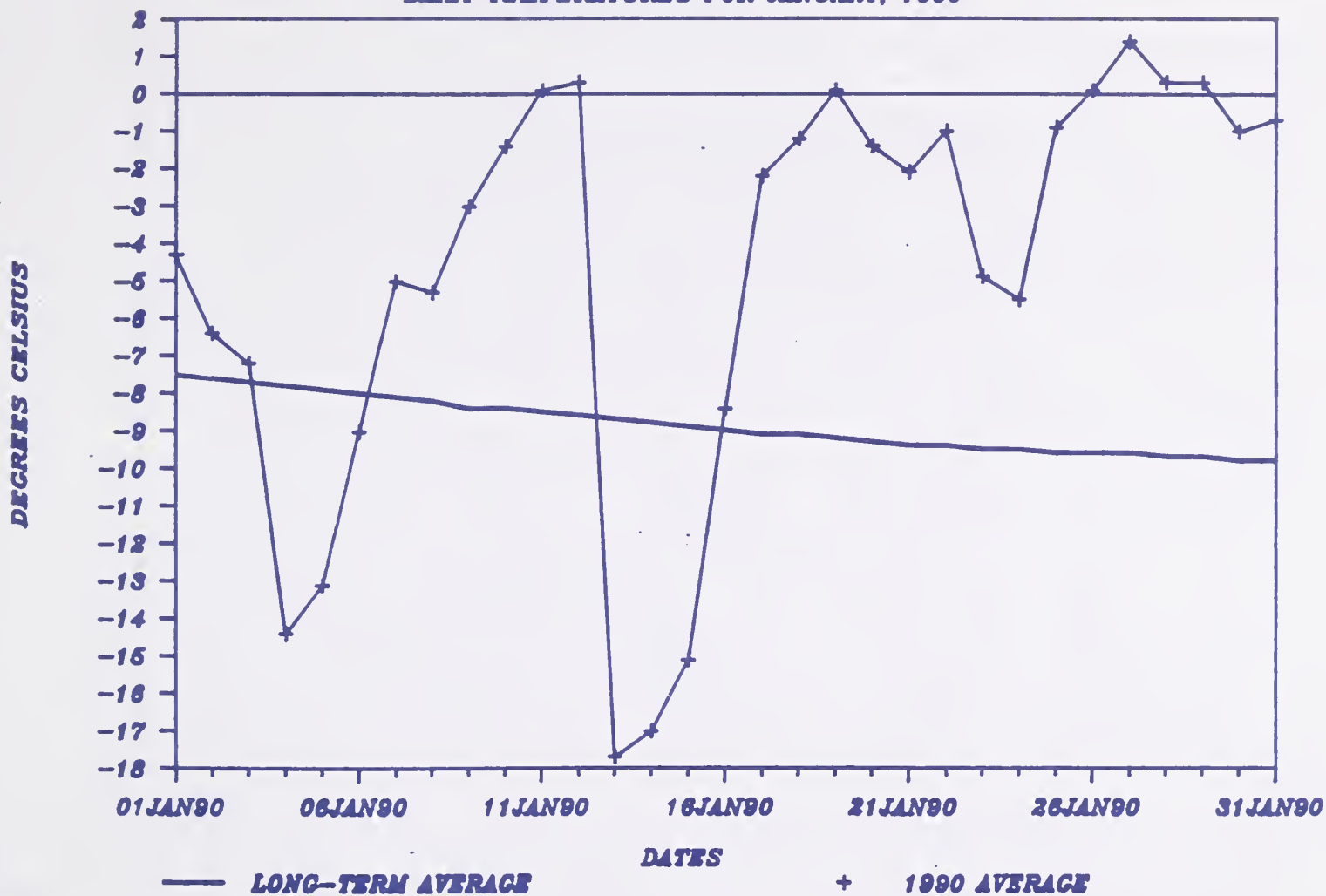
3/ Minus indicates withdrawal from stocks.

4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.

5/ Preliminary for trade, availability, utilization, and stocks change.

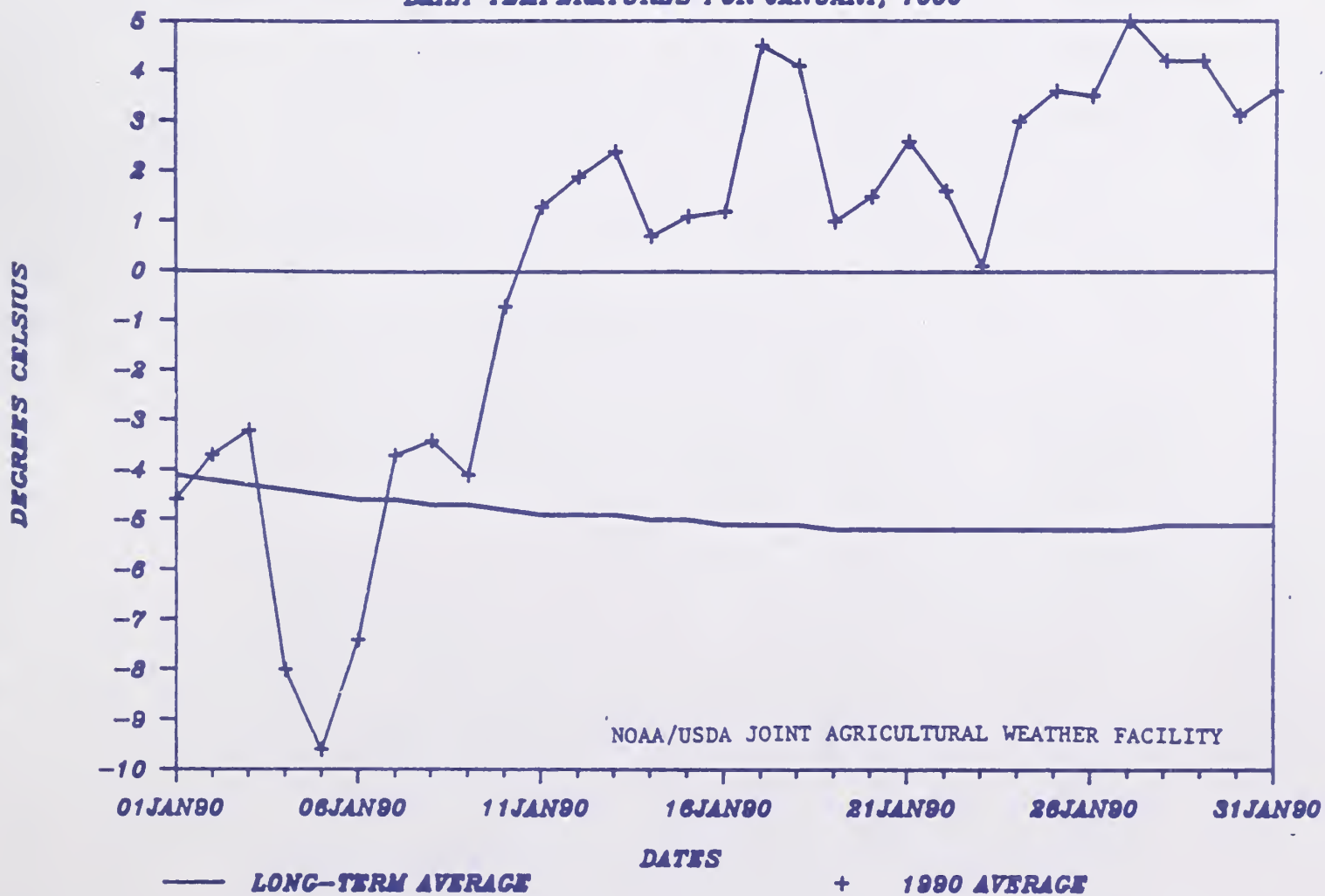
CENTRAL BLACK SOILS

DAILY TEMPERATURES FOR JANUARY, 1990



WESTERN UKRAINE

DAILY TEMPERATURES FOR JANUARY, 1990



UNITED STATES DEPARTMENT OF AGRICULTURE

Foreign Agricultural Service
Room 4644-S
WASHINGTON, D.C. 20250-1000

OFFICIAL BUSINESS
PENALTY FOR PRIVATE USE, \$300

FIRST-CLASS MAIL
POSTAGE & FEES PAID
USDA-FAS
WASHINGTON, D.C.
PERMIT No. G-262

If your address should be changed _____ PRINT
OR TYPE the new address, including ZIP CODE and
return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 4644 So.
U.S. Department of Agriculture
Washington, D. C. 20250.

USSR Total Grain Imports 1/
By Country of Origin by Months
(1,000 Tons)

	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total 2/
January 1987	---	383	153	642	75	1,253	
February	---	207	101	1,140	330	1,778	
March	316	497	134	1,165	303	2,415	
Jan-March	316	1,087	388	2,947	708	5,446	6,400
April	1,753	1,018	129	1,452	765	5,117	
May	1,840	777	123	1,050	412	4,202	
June	193	11	13	150	40	407	
April-June	3,786	1,806	265	2,652	1,217	9,726	12,400
July	1,915	---	---	59	10	1,984	
August	1,064	---	---	---	---	1,089	
September	316	74	---	---	---	415	
July-September	3,295	74	---	59	10	3,488	4,600
October	---	872	---	540	---	1,422	
November	525	357	---	708	---	1,607	
December	1,703	332	---	435	---	2,485	
October-December	2,228	1,561	---	1,683	---	5,514	6,500
January 1988	1,852	72	---	647	---	2,571	
February	1,746	93	---	764	135	2,738	
March	2,255	101	---	924	486	3,766	
Jan-March	5,853	366	---	2,335	621	9,075	10,000
April	2,406	713	---	275	332	3,726	
May	1,995	1,123	---	180	6	3,304	
June	755	898	---	235	---	1,888	
April-June	5,156	2,734	---	690	338	8,918	10,400
July	375	131	---	53	35	594	
August	804	---	---	15	175	994	
September	344	126	---	1	4	475	
July-September	1,523	257	---	69	214	2,063	2,600
October	1,935	524	---	480	264	3,203	
November	1,529	341	15	1,011	114	3,010	
December	1,585	261	---	1,422	47	3,315	
October-December	5,049	1,126	15	2,913	425	9,528	10,800
January 1989	2,234	316	---	633	43	3,226	
February	2,631	172	---	861	23	3,687	
March	3,115	81	---	954	202	4,352	
Jan-March	7,980	569	---	2,448	268	11,265	12,100
April	2,105	371	80	1,500 3/	182	4,238	
May	3,061	351	104	650 3/	221	4,387	
June	2,752	60	66	450 3/	66	3,394	
April-June	7,918	782	250	2,600 3/	469	12,019	13,500
July	1,408	49	---	206 3/	---	1,663	
August	389	---	---	26 3/	---	415	
September	---	---	---	37 3/	---	37	
July-September	1,797	49	---	269 3/	---	2,115	2,600
October	805	---	---	35 3/	---	840	
November	3,497	396	---	310 3/	---	4,203	
December	3,145	311	---	700 3/	N/A	4,156	
October-December	7,447	707	---	1,045 3/	---	9,199	9,900

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available